



Niagara Escarpment Parks and Open Space System Planning Manual

March 2012



Cover photos clockwise from top left:

Skiing at Kelso Conservation Area, Conservation Halton

Historic Queenston Heights Park

Snowshoeing at Crawford Lake Conservation Areas, Conservation Halton

Mount Nemo Conservation Area, Conservation Halton

Niagara Escarpment Parks and Open Space System Planning Manual

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Conformity with the Niagara Escarpment Plan (2005)

Management agencies will prepare plans for each park or open space in the Niagara Escarpment Parks and Open Space System. Each Plan will establish policy guidelines for long term protection, development and management of the park or open space area.

Niagara Escarpment Plan (2005), section 3.1.6

Agencies will be encouraged to bring such plans into conformity over a number of years when park and open space plans are renewed, updated or reviewed for conflict with the Niagara Escarpment Plan.

Niagara Escarpment Plan (2005), section 3.1.5

Overview and Purpose

Overview of the Niagara Escarpment

The Niagara Escarpment is a 725-kilometre ridge of fossil-rich sedimentary rock that reaches 510 metres at its highest point and bisects southern Ontario from the islands off Tobermory on the Bruce Peninsula to Queenston on the Niagara River. The Escarpment has important geological and ecological characteristics and is a designated United Nations Educational, Scientific and Cultural Organization (UNESCO) World Biosphere Reserve.

In 1973, the Niagara Escarpment Planning and Development Act (NEPDA) established a planning process to ensure that the area would be protected. From this emerged the Niagara Escarpment Plan (1985; revised in 2005), which was Canada's first large-scale environmental land use plan and set the stage for subsequent environmental land use plans, including the Greenbelt Plan (2005) and the Oak Ridges Moraine Conservation Plan (2002).

Part 3 of the Niagara Escarpment Plan (2005) (NEP) sets out policies for the Niagara Escarpment Parks and Open Space System (NEPOSS). These policies form a framework for establishing and coordinating a system of publicly owned lands on the Escarpment.

The NEPOSS is owned and managed through the continued cooperation of seven conservation authorities, the Ontario Ministry of Natural Resources (MNR), the Ontario Heritage Trust, Parks Canada, the St. Lawrence Seaway Authority, the Niagara Parks Commission, the Royal Botanical Gardens, municipalities and other bodies (e.g., the Bruce Trail Conservancy (BTC) local service clubs, approved conservation organizations).

The NEPOSS is comprised of more than 140 parks and open space areas, most of which are or will be connected by the Bruce Trail. This system balances protection, conservation and sustainable development to ensure that the Escarpment will remain largely as a natural environment for future generations.

Purpose of the Manual

The NEP requires all park and open space agencies (hereafter referred to as "agencies") to prepare a master/management plan (hereafter "management plan") for each park and open space in the NEPOSS. This manual provides guidance to agencies on the design, development, implementation and maintenance of those management plans, and outlines the processes that agencies should follow to produce and maintain a management plan. The manual should be read in conjunction with the NEPDA and Part 3 of the NEP.

Each management plan will establish direction for long-term protection, development and management of the park or open space that meet the requirements of the Environmental Assessment Act and are consistent with the NEP. Management plans should reflect the predominant characteristics of the property while protecting natural heritage features and cultural heritage features, creating outdoor educational and recreational opportunities, and providing public access to the Niagara Escarpment.

This manual applies to parks and open spaces that are identified in Appendix 1 of the NEP and to any new parks or open spaces, and additions to existing ones, that are not cited in that Appendix.

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Abbreviations Used in This Manual

ANSI	Area of Natural and Scientific Interest
BTC	Bruce Trail Conservancy
MNR	Ontario Ministry of Natural Resources
NEC	Niagara Escarpment Commission
NEP	Niagara Escarpment Plan
NEPDA	Niagara Escarpment Planning and Development Act
NEPOSS	Niagara Escarpment Parks and Open Space System
UNESCO	United Nations Educational, Scientific and Cultural Organization

1.0 INTRODUCTION

1.1 Background of the Niagara Escarpment Parks and Open Space System



Terra Cotta Conservation Area, Courtesy of Credit Valley Conservation Authority

In 1967, then Ontario premier John Robarts commissioned Dr. Len Gertler, a professor of planning at the University of Waterloo, to conduct a wide-ranging study to determine how best to ensure the preservation of the Niagara Escarpment. This study led to the government's decision to protect the Escarpment with a specific statute – the Niagara Escarpment Planning and Development Act (NEPDA), which came into force in 1973.

In the same year, a 17-member Niagara Escarpment Commission (NEC) was established under the Act. The NEC's initial task was to prepare a provincial plan for the Niagara Escarpment and to administer a system of development control.

Gertler's report introduced the concept of a Niagara Escarpment Parks System. The development of public parks along the Escarpment had been going on for many years, but not as part of a coordinated program. Gertler recommended that a network of Escarpment parks be established:

The emerging concept of a Niagara Escarpment Parks System can satisfy the goals of safeguarding the natural parkland assets of the Escarpment and of providing for greater public enjoyment of these resources. Such a system could be designed to yield excellent recreational and economic benefits to the people of Ontario. The co-operation of all levels of government, government agencies, and private groups within an overall plan is necessary to achieve the recreational development potential of the Niagara Escarpment.

Natural Escarpment Study Conservation and Recreation Report (1968)¹

In 1985, 12 years after the passing of the NEPDA and the establishment of the NEC, Cabinet approved the Niagara Escarpment Plan (NEP). Policies for the establishment of a Niagara Escarpment Parks and Open Space System (NEPOSS) were set out in Part 3 of the 1985 NEP.

The NEPOSS is comprised of more than 140 parks and open space areas, most of which are connected by the Bruce Trail. The parks and open spaces within the system contribute to the protection of the Escarpment's natural heritage features and cultural heritage features by providing opportunities for sustainable recreation.



Re-enactment of the 1813 Battle of Stoney Creek, Courtesy of the City of Hamilton

¹ Niagara Escarpment Study Group. 1968. Niagara Escarpment Study Conservation and Recreation Report. Treasury Department, Finance and Economics, Government of Ontario.

1.2 Legislation and Policy Context for NEPOSS Planning

Niagara Escarpment Planning and Development Act (1973)

The legislative basis for the NEPOSS is the NEPDA. The purpose of the Act is as follows:

To provide for the maintenance of the Niagara Escarpment and land in its vicinity substantially as a continuous natural environment, and to ensure only such development occurs as is compatible with that natural environment.

Niagara Escarpment Planning and Development Act (1973)

The Niagara Escarpment Plan (2005)

Policies related to the NEPOSS are contained in Part 3 of the 2005 NEP. Section 3.1.3 of the NEP confirms that “The strength and public image of the NEPOSS are entirely dependent upon the cooperation of the various park and open space management agencies in complying with the policies of the Niagara Escarpment Plan.” Specifically in relation to the content of this manual, section 3.1.3 also states that it is expected that there will be a “common application of a set of park and open space planning and management policies to individual parks and open space areas with the System.” For example, all management plans for NEPOSS properties are expected to demonstrate consideration of the NEPOSS objectives shown below.



Crook's Hollow, Courtesy of Hamilton Conservation Authority

NEPOSS Objectives

1. To protect unique ecological and historical areas;
2. To provide adequate opportunities for outdoor education and recreation;
3. To provide for adequate public access to the Niagara Escarpment;
4. To complete a public system of major parks and open space through additional land acquisition and park and open space planning;
5. To secure a route for the Bruce Trail;
6. To maintain and enhance the natural environment of the Niagara Escarpment;
7. To support tourism by providing opportunities on public land for discovery and enjoyment by Ontario's residents and visitors;
8. To provide a common understanding and appreciation of the Niagara Escarpment; and
9. To show leadership in supporting and promoting the principles of the Niagara Escarpment's UNESCO World Biosphere Reserve Designation through sustainable park planning, ecological management, community involvement, environmental monitoring, research and education.

Niagara Escarpment Plan (2005), section 3.1.1

Management Planning Policy

Section 3.1.6 of the NEP contains general policies in relation to the park and open space planning process that outline the following:

- What should be included in the plan
- Implementation requirements related to the Environmental Assessment Act
- Context for the degree of policy flexibility allowed in the parks and open space planning process
- Policy implication of not having an approved plan in place
- Park and open space zoning requirement
- Inclusion of Bruce Trail considerations
- Park classification policy
- Development control in parks and open spaces with an approved management plan
- Requirements related to the United Nations Educational, Scientific and Cultural Organization (UNESCO) World Biosphere Reserve designation

Other specific policies contained in Part 3 of the NEP relate to the following:

- Nodal Parks
- Parks and open space classification
- Recreation and commercial uses in parks and open spaces
- Parks and open space zoning
- The Bruce Trail
- Municipal parks and open space



Tiffany Falls Conservation Area, Courtesy of Hamilton Conservation Authority

- Land acquisition and land disposal
- Addition or deletion of parks or open space

These and other relevant policies contained in the NEP need to be thoroughly considered early in the planning process to meet the necessary requirements for final approval of a management plan.

Note: The NEPOSS Planning Manual should be read in conjunction with both the NEPDA and the NEP.

Tip

Other Relevant Legislation and Policies

Numerous legal provisions and statutory obligations need to be considered and, if necessary, reflected in the development and implementation of a management plan. For a full list of other relevant legislation and policies, refer to Appendix B of the Natural Heritage Reference Manual for the Natural Heritage Policies of the Provincial Policy Statement, 2005, MNR, second edition, 2010 (Natural Heritage Information Sources)

1.3 NEPOSS Council

The concept of a NEPOSS Council was initiated during the first review of the NEP in 1990. The Hearing Officers recommended that a coordinating council be established to create a supportive network to assist park managers in learning from each other's triumphs and mistakes, and to bring about a progressive development of service delivery in Escarpment parks.

The 1993 Hearing Officers Executive Summary stated:

We consider the Niagara Escarpment Parks System vital to the success of the Plan. The System, as it was drawn up, depends on cooperation among municipalities, conservation authorities, the Bruce Trail Conservancy and other agencies whose lands, together, make up the System. It is time to expand and strengthen that cooperative approach, making it clear that the participating governments and agencies own not just some of the land in the Park System, but a piece of the System itself. We believe this will bring a renewed commitment from all partners to help the System thrive.

Also during that time period, the UNESCO recognized the Niagara Escarpment as a World Biosphere Reserve. UNESCO encourages collaborative efforts among park



Dundas Valley Conservation Area, Courtesy of Hamilton Conservation Authority

managers to promote the sustainability of local economies and communities, as well as the conservation and stewardship of Escarpment ecosystems. A council was initiated in the early 1990s to discuss common issues and exchange information, however, the council was discontinued in 1996.

The NEPOSS Council was re-established in 2009 with the belief that more could be accomplished in NEPOSS as a collective than as individual parks and natural spaces. The success of the NEPOSS Council is dependent upon the active support and cooperation of its members.

Purpose

The NEPOSS agencies are responsible for managing public land on the Niagara Escarpment and for developing and supporting NEPOSS initiatives and programs.

The NEPOSS Council's purpose is to advance the NEPOSS objectives identified in the NEP. It was created in recognition of a need to foster dialogue on NEPOSS issues and improve liaison, shared resources, and coordinated action among various NEPOSS agencies.

The Council will provide advice to the Ontario Ministry of Natural Resources (MNR) and the NEC on NEPOSS policies and programs and bring awareness to Council issues.

The Council will:

- report and respond to the MNR as requested;
- report to their respective organizations on Council initiatives;
- provide effective leadership for coordinated park management and stewardship;
- protect natural and cultural heritage features of NEPOSS;
- support the growth of NEPOSS through land securement initiatives;
- develop a centralized strategic marketing and communication process;

- build strong relationships with key stakeholders (e.g. Nature Conservancy of Canada, Coalition on the Niagara Escarpment, etc) and Aboriginal Communities to address common park and open space issues and interests; and
- work together to provide an interconnected system of trails and educational and recreational opportunities.

Council Members

The Council is comprised of park and natural space agencies that are responsible for the management of public land in the NEPOSS, including the Bruce Trail. The Council should strive to maintain a membership that has strong geographic representation to ensure the diverse needs of the park agencies are met. MNR and NEC staff are non-voting advisors. (Refer to the NEPOSS Council Terms of Reference, 2008).

2.0 MANAGEMENT PLANNING



Kelso Conservation Area, Courtesy of Conservation Halton

This section of the manual explains the need for management plans and outlines the management planning process for parks and open spaces. Developing the purpose and vision for a park or open space early in the management planning process helps the planning team focus on the most important features, pressures and activities. The planning process links practical actions to clear, site-specific objectives that enable achievement of the goals and vision for the park or open space. Monitoring the implementation of management direction allows an assessment of the effectiveness of that planning direction and informs adaptive management strategies based on lessons learned.

Not all parks and open spaces require the same level of planning and management. Each site and management plan is unique. Therefore, no single management plan template can be applied to all parks and open spaces. Successful management plans vary in terms of detail, structure and implementation. In some instances, it is possible to isolate or combine elements of the planning cycle when undertaking the planning process.

The determination of planning needs depends on several factors, including the following:

- The known or potential features (e.g., species at risk, representative natural heritage features and cultural heritage features)
- The current and projected recreational demand in an area
- The complexity of pressures, issues or proposals
- The level of infrastructure development being contemplated
- The quality of background information available to support planning and decisions
- The degree of public and stakeholder interest

The planning team should consider these factors when developing a project charter and determining the appropriate management directions.

2.1 Management Plans

The NEP requires all park and open space agencies to prepare management plans for the lands they manage and/or own in the NEPOSS. The management plans lay out the goals and objectives, and guide the protection and management of natural heritage features and cultural heritage features, and activities in parks and open space areas.

Generally, a management plan will conform to the NEP if it answers positively to the following questions:

1. Has the management plan established policy guidelines for long-term protection, development and management of the park or open space in accordance with the management planning policy (section 3.1.6) in the NEP?

2. Does the management plan contain appropriate zoning and planning policies?
3. Has an appropriate park classification, conforming to the NEP's parks and open space classification policy (section 3.1.4), been assigned or confirmed?
4. Does the management plan identify the Bruce Trail corridor (where applicable), and does it provide policies for managing the corridor in cooperation with the Bruce Trail Conservancy (BTC)?
5. Has the management plan been developed in accordance with guidelines contained in this manual?

Creating a Single Management Plan for a Group of Parks

Producing a single management plan for a grouping of protected areas based on common criteria is possible. Various parks and open space areas have incorporated the concept of one comprehensive planning/consulting process to produce a single management plan and, in the right context; this has streamlined the task of preparing management plans.

In certain circumstances, however, grouping areas to accommodate the production of a single management plan may not be appropriate, for example, when:

- a park or open space has a number of complex issues that should be dealt with in a separate plan;
- an extensive resource inventory is needed because of the large size of the park or open space;
- the location of the park or open space is geographically distant from other areas, making grouping them for planning unfeasible; and
- parks or open space areas that have conflicting or dissimilar uses (e.g., a recreation area containing facilities and an area containing distinctive natural areas) and so should not be combined for planning.

2.2 Management Planning Process

The management planning process will provide the agency, the public, the NEC, and the MNR with a high level of confidence that development and recreational activities permitted in a park or open space are appropriate, while adhering to the system's goals and objectives as identified in the NEP.

NEC and MNR Consultation

The NEC and the MNR are to be consulted at various times, as described below, throughout the development of the management plan and as necessary during its implementation:

- When initiating the management planning process, agencies are encouraged to contact the NEC and MNR Niagara Escarpment Program staff to discuss the management plan process, the unique natural heritage and cultural features of the property, and opportunities for protection and sustainable development.
- The NEC is required to review and endorse final draft plans to ensure conformity with the NEP before forwarding them to the MNR for final approval.
- Agencies must contact the NEC when implementing any portion of an approved plan that requires a development permit.



Christie Conservation Area, Courtesy of Hamilton Conservation Authority

Table 2.1 Phases of the Management Planning Process

Phase	Recommended/ Required	Result
Develop the NEEPOSS project charter	Recommended	A project charter, which is similar to a terms of reference document, includes, for example, clear statements about the intended scope of the plan, the main steps of the process, and the roles and responsibilities of participants.
Gather information/ undertake research	Required	A current inventory and analysis of the natural heritage features, cultural heritage features, recreational uses and visitor support infrastructure is completed and summarized in a background report to support decision making throughout the planning process and to provide supporting information for the management plan. May include pre-consultation to determine public and stakeholder interests and issues.
Determine classification, zoning and management direction	Required	Building on the information collected and analyzed in the inventory, the park or open space is appropriately classified and zoned with appropriate, site-specific management direction guided by classification and zoning policies in Part 3 of the NEP.
Conduct public consultation	Required	Individuals and stakeholder organizations with interests in parks and open space are engaged in the management planning process.
Write the monitoring and evaluation section	Required	The monitoring and evaluation section outlines proposed techniques to track the progress of the implementation of the management plan to ensure that the goals and objectives are being met.
Write the implementation section	Required	A completed implementation section provides direction on how to proceed with the implementation of the management plan.
Finalize the management plan	Required	A management plan, based on thorough research and public consultation, for the protection, maintenance and use of the park or open space is finalized.
Seek approval of the management plan	Required	The NEC reviews and endorses the plan, and the MNR approves it.

3.0 NEPOSS PROJECT CHARTER

Agencies are advised to start the parks and open space planning process with the development of a project charter.

3.1 Developing a Project Charter

A project charter is similar to a terms of reference document: once created, it will guide agencies through the management plan development process. A project charter is a very helpful document when engaging in early consultation with the agency's board of directors, the MNR, the NEC, the public and stakeholders. As a reference for the planning team, the project charter keeps the project on track and clearly identifies responsibilities and deliverables. External consultation about the project charter is not necessary. The agency team can update it as the process unfolds and more information becomes available.

- The project charter should:
- identify priorities, goals and objectives;
- identify team roles and responsibilities;
- confirm and describe the geographic planning area or the potential grouping of similar properties;
- assess planning complexity;
- identify relevant policies and legislation;
- include existing information about the property;
- identify key stakeholders;
- identify opportunities, challenges and issues;

- provide information on the planning schedule and deliverables; and
- Identify project resources and costs.

Appendix A outlines a project charter.

Tip

The project charter is a living document. It may need to be updated to reflect new information as the planning process is under way.



Dundas Valley Conservation Area, Courtesy of Hamilton Conservation Authority

4.0 INFORMATION GATHERING/RESEARCH



Bruce Trail at Cape Croker, Courtesy of Gary Hall and the Bruce Trail Conservancy

In the early stages of the planning process, information should be gathered to create an inventory of the natural heritage features and cultural heritage features of a property, the species that inhabit it, and its existing infrastructure and uses. The information gathering stage could also include some preliminary consultation with the public and stakeholders to determine their interests in and concerns about the property. This information will be used to:

- assess the natural heritage features and cultural heritage features, uses, infrastructure and related pressures on and issues relating to the property;
- help articulate planning objectives and determine zoning and management direction and actions;
- determine what areas are best suited for new development; and
- help define baseline conditions against which managers can evaluate the effectiveness of management plan actions and adapt them as required in the future.

A summary of this research, the inventories and assessments completed should accompany the final management plan as a background document.

Tip

When compiling research results, the locations of sensitive species and archaeological features observed and recorded should not be mapped or precisely identified in a publicly available document as per the requirements of the MNR and the Ontario Ministry of Tourism, Culture, and Sport.

Note: Before any files or documents are made available to the public, their content should be thoroughly screened to ensure that data about sensitive species and features is not included.

4.1 Completing the Inventory

An inventory of natural heritage features and cultural heritage features will vary significantly from site to site, depending on the size and characteristics of the property and the variety of services, facilities and activities offered. In general, parks and open spaces with greater complexity require more data to support decisions.

Partial Inventory

Agencies with multiple or large parks or open spaces may wish to consider undertaking partial inventories, excluding the portion of the properties where no development or intrusion are considered in the short term. The specific area would be clearly indicated, and no development or intrusion (e.g., trails) would be allowed in the area until appropriate inventories are completed and management directives are made. Given

the time and expense involved in undertaking inventories, undertaking partial inventories may help spread costs over time and allow completion of the management plan in a phased manner.

Limited Inventory

Agencies with small or non-operational parks or open spaces where use or potential for development are limited may wish to consider a limited inventory. For a limited inventory, agencies should either conduct a preliminary information assessment or use existing information, depending on the currency and extent of the existing area information. These options may provide specific direction for on-the-ground assessments or reduce the need for extensive assessments.

Information Sources

To support agencies in identifying and evaluating natural heritage features, provincially available information sources are identified in Appendix B of the Natural Heritage Reference Manual for the Natural Heritage Policies of the Provincial Policy Statement, 2005, MNR, second edition, 2010 (Natural

Heritage Information Sources). For more information on cultural heritage features, refer to the Ontario Heritage Tool Kit as developed by the Ministry of Tourism, Culture, and Sport. The suggested information sources are not exhaustive. Additional information sources (e.g., a local naturalist group) may need to be consulted when further information on a particular natural heritage feature or area is required. Questions on the proper use of MNR's data for municipal land use planning purposes should be referred to the local MNR district office.

Components of the Inventory

Table 4.1 describes six broad categories of background information and provides examples of the type of content they might contain. The categories are also discussed in Appendix B. The exercise of collecting information to be included in a background information document primarily consists of (a) identifying and defining the values, (b) assessing the benefits (quantitative and/or qualitative) that may be derived from those values and (c) assessing the potential for those values to be compromised in some manner. Other types of information may be collected.

Table 4.1 Inventory Categories

Category	Examples of Features	Types of Information
Natural heritage features	<ul style="list-style-type: none"> Wildlife and fish habitat Habitat of endangered, threatened and rare species, and species of special concern Hydrological systems (e.g., streams, wetlands, ponds) Woodlands Areas of Natural and Scientific Interest (ANSIs) Earth and life science values Escarpment features (brow, slope, face, toe and related landforms) Geology Flora 	<ul style="list-style-type: none"> Map of natural heritage features Map of permanent ecological features (e.g., hydrological systems) Describe past and present management initiatives (e.g., monitoring, inventory assessments) <p>Note: Sensitive species and features should not be mapped in public documents.</p>

Category	Examples of Features	Types of Information
Cultural heritage features	<ul style="list-style-type: none"> Archaeological resources which may include: <ul style="list-style-type: none"> Indigenous settlers Indigenous people's farming societies Places with ceremonial or cultural significance Indigenous people's burial, hunting and gathering areas Cultural heritage landscapes Built heritage resources Industrial and domestic heritage structures 	<ul style="list-style-type: none"> Description of site features Map of cultural heritage features Site survey and analysis of the features which make up the cultural heritage landscape as well as delineation of landscape boundaries. <p>Note: Archaeological features should not be mapped in public documents.</p>
Recreational uses	<ul style="list-style-type: none"> Recreational uses (e.g., hiking, picnicking, appreciation) Public education and park interpretation 	<p>Maps of recreational uses and visitor support infrastructure</p> <p>Assessment of sustainable and compatible recreational activities</p>
Visitor support infrastructure	<ul style="list-style-type: none"> Visitor centres, specialized recreational facilities, comfort stations and picnic shelters Trailheads, signs, road systems and parking Administrative and maintenance facilities 	<ul style="list-style-type: none"> Assessment of existing park infrastructure which may include recommendations for modernization and renovation if required
Social and economic values	<ul style="list-style-type: none"> Visitor profiles (demographics, use frequency, experience satisfaction, tourism trends) Values and perceptions relating to parks and open spaces and their governing agencies Trends affecting parks or open spaces 	<ul style="list-style-type: none"> Social and economic maps that highlight demographic attributes (e.g., population size, density and distribution, ethnicity, household income, and age) Visitor surveys, workshops and meetings

Category	Examples of Features	Types of Information
Pressures on park and open space features	<ul style="list-style-type: none"> Pressures that may have a negative (or positive) effect on features or ecosystem functions Natural pressures resulting from ecosystem functions such as natural succession, erosion, fire, extreme weather, etc. Human pressures resulting from recreational use (current or new), invasive species, unauthorized dump sites, etc. 	<ul style="list-style-type: none"> History of use Identification of ecological stress Analysis and mapping of values and pressures Visitor impact management plan Visitor profiles and surveys
Park or Open Space policy (if existing)	<ul style="list-style-type: none"> Assessment of implementation of past management direction Analysis of the overall effectiveness in achieving previously set protected area objectives and policies Efforts in adaptive management 	<ul style="list-style-type: none"> Zoning map Past management direction Documentation of previous planning history

Appendix B of this manual gives more details about the background information to be collected.

4.2 Analyzing and Assessing the Information Gathered

The analysis and assessment of the inventory of site features should:

- determine the relative significance of the natural heritage features or cultural heritage features;
- assess the benefits (qualitative or quantitative) that may be derived from those features;
- identify and assess the pressures affecting the features;
- identify the best options and approaches for resolving the issues and challenges;
- identify the best options and approaches for

conserving, managing, maintaining or enhancing these features and aspects of service;

- develop plans for improvement of the facility or supporting infrastructure;
- rank issues for management response and action; and
- provide information to support park classification and zoning.



Jefferson Salamander, Courtesy of Bruce Trail Conservancy



Trillium, Courtesy of Niagara Peninsula Conservation Authority

If the analysis and assessment process reveals that the site has features of significance or is affected by pressures that have not been planned for, they should be reflected in the vision, aims and objectives of the park management plan and resulting work plan.

Tip

Areas that may not be suitable for development might include environmentally sensitive areas such as ANSIs, significant habitat of endangered and threatened species or species of special concern, and significant wetlands. For detailed information on environmentally sensitive areas, refer to the Natural Heritage Reference Manual for the Natural Heritage Policies of the Provincial Policy Statement, 2005, second edition (2010).

4.3 Human and Financial Resources for Undertaking Research

The human and financial resources required to carry out an inventory of site features will depend on the size and type of site, the complexity of the issues involved, available information and the agency's capacity to accomplish the tasks.

Support and expertise for conducting inventories may come from a variety of internal and external sources. Agencies may want to consider involving volunteers (e.g., local interest groups, university students) to help collect data. Volunteers are often professionals who have diverse skill sets, for example, planners, landscape architects, fundraisers, ecologists, educators, and so on. Volunteers may require direction from staff to ensure that data is collected and documented appropriately.

Limited human and financial resources should not prevent the development of an inventory. It is acceptable to indicate in the management plan that additional work or research are needed to improve existing information, along with an estimated time frame for completing the additional work or research.



Courtesy of Royal Botanical Gardens

5.0 PARKS AND OPEN SPACE CLASSIFICATION AND ZONING



Country Heritage Park, Courtesy of Country Heritage Agricultural Society

Classifications and zones serve as a guide to agencies in the management and use of a park or open space.

This section explains the process by which agencies build on the information collected in the research phase and helps to ensure that the park or open space is correctly classified and zoned with appropriate, site-specific management direction (see sections 3.1.4 and 3.1.5 of the 2005 NEP).

5.1 An Introduction to Parks and Open Space Classification

Parks and open space areas currently in the NEPOSS are assigned a classification based on the predominant characteristics of the property (see Appendix 1 of the 2005 NEP). The classifications identify the variety and diversity in the system. Each of the six classifications serves a specific purpose and provides planning and management direction to agencies. Table 5.1 provides information on the classification and planning guidelines. The classifications are as follows:

- Nature Reserve
- Natural Environment

- Recreation
- Historical
- Escarpment Access
- Resource Management Areas

Confirming or Changing Classifications

The inventories undertaken in the research phase will help agencies confirm or consider changing the classification assigned to the park or open space.

Where a number of agencies own and/or manage contiguous lands within a common park or open space area boundary, the agencies will determine the classification by consensus.

- Classifications are subject to confirmation each time a management plan is prepared or revised.
- After completing the management planning process, on rare occasions agencies may wish to propose an entirely new classification that more accurately reflects the characteristics of the park or open space.
- Agencies should provide supporting documentation and rationale when recommending a new classification or a classification change.
- Changes to a classification as a result of the planning process will not require an amendment to the NEP but should be done in consultation with the NEC and the MNR.
- The NEC must endorse the recommended classification changes, and the MNR approves or amends them, along with the rest of the new/revised management plan.
- The NEC is responsible for revising Appendix 1 and map 10 of the NEP to reflect changes to classifications.



Old Baldy, Courtesy of Grey Sauble Conservation Authority

Table 5.1 Parks and Open Space Classifications

Classification	Description	Management Direction	Permitted Uses (subject to management planning)
Nature Reserve	Nature Reserves represent the most significant and distinctive natural areas and landforms found along the Niagara Escarpment. These areas serve to protect selected life science and earth science ANSIs.	Management practices and uses in a Nature Reserve will ensure that the features and values for which it was established remain protected in perpetuity.	<p>Access to Nature Reserve class parks will not be widely promoted due to the sensitivity of the features in them. Activities will be limited to those that can further scientific understanding and education (e.g., scientific research, natural history interpretation, nature trails or the Bruce Trail).</p> <p>Facilities will be kept to a minimum.</p> <p>Forestry or tree cutting in a life science ANSI in public ownership will be permitted where it is necessary to maintain the features for which the area was designated, for emergency access or to implement uses permitted in an approved NEPOSS management plan that are not in conflict with the NEP.</p>
Natural Environment	Natural Environment lands are characterized by the variety and combination of outstanding natural heritage features, cultural heritage features and outstanding landscape.	Natural Environment lands provide opportunities for the protection of important natural heritage features and cultural heritage features.	Activities may range from back-country hiking in the interior to car-camping and day use activities in the more developed or accessible areas. Agencies should consider compatible uses within the park or open space.

Classification	Description	Management Direction	Permitted Uses (subject to management planning)
Recreation	<p>Recreation parks are some of the best recreational environments along the Escarpment.</p> <p>Such parks occur naturally or are capable of being developed to provide a wide variety of outdoor recreation opportunities in attractive Escarpment surroundings.</p>	<p>Management and development of resources is appropriate in order to provide the recreational environment and facilities required to support a wide variety of activities, which may be for day use only.</p> <p>While public use of recreation parks may include more intensive activities or uses than at other NEPOSS parks, these activities will be suited to the natural character of the particular park. Such activities must occur in zones identified in an approved management plan and be conducted in an environmentally sustainable manner.</p> <p>Development of facilities must be designed and undertaken in a way that will minimize the environmental impact of the development.</p>	<p>Facilities for overnight camping may be provided, including campgrounds, temporary yurts and tents, lean-to's and unserviced cabins.</p> <p>Visitor service facilities with a retail component may be permitted.</p> <p>Small-scale, special-purpose facilities designed and operated in support of natural history, environmental and UNESCO World Biosphere Reserve and related programming, which may include fully serviced overnight accommodations with meals for facility guests only, are permitted. They may also be allowed as an accessory use if specifically permitted in an approved management plan.</p> <p>Note: Intensive commercial facilities, such as full-service restaurants, banquet halls, lodges, hotels, conference centres, retreats, schools, spas and buildings with provision for fully serviced overnight accommodation, as distinct from camping, will not be permitted.</p> <p>Certain activities or functions such as those listed above may be considered if such use is a secondary or an off-season use at an approved recreational facility. For example, a ski lodge where food is served during the winter may be used for occasional day conferences during off-season periods.</p>
Historical	<p>Historical parks or open spaces are characterized by the distinctive features that represent the Escarpment's archaeological and historic heritage.</p>	<p>Historical parks or open spaces are intended to protect and interpret the distinctive features representative of the Escarpment's archaeological and historic heritage.</p>	<p>Development of facilities in these lands will be oriented primarily to the protection, enhancement and interpretation of the archaeological or historical characteristics of the site.</p>

Classification	Description	Management Direction	Permitted Uses (subject to management planning)
Escarpment Access	Escarpment Access parks or open spaces will complement the larger and, in some cases, more developed parks or open space areas, by providing opportunities for public access to the Niagara Escarpment at appropriate points of interest along it. Generally, these areas are small (4 ha – 25 ha).	Escarpment Access parks or open spaces are intended to provide opportunities for public access to the Escarpment.	Modest facilities may be provided to support day use activities at viewpoints, rest areas, trailheads, picnic sites, scenic areas, fishing areas, beaches or other points of interest.
Resource Management Area	Resource Management Areas include certain public lands that are managed primarily to provide resource-related benefits such as forest products, fish and wildlife, or flood control.	Resource Management Areas are intended to provide many benefits, including recreation opportunities, the protection of important natural heritage features and cultural heritage features, and resource products. In most cases, these areas will undergo more intensive resource management than the other classifications.	Uses of these areas may include sustainable forest and wildlife management, and activities such as hiking, cross-country skiing and nature appreciation.

Where permitted by the Park Classification, recreation uses in parks and open space, other than in Recreation Parks, shall be incidental or secondary to the protection of land within the park or open space area for public enjoyment and as habitat for wildlife and plant communities.

Niagara Escarpment Plan (2005), section 3.1.4.1

5.2 Nodal Parks

Nodal Parks represent distinct regional features and characteristics. The function of Nodal Parks is to provide visitor reception services and information about broader NEPOSS park and open space activities, points of interest and attractions in the region. The goals of Nodal Parks are as follows:

- Orientation – to tell visitors where they are in relation to other parks, open space areas, trails, natural heritage features and cultural heritage features, and points of interest
- Education – to stimulate an understanding of the Niagara Escarpment and its many natural heritage features and cultural heritage features (e.g., World Biosphere Reserve)
- Interpretation – to familiarize visitors with the features of the park or open space area
- Recreation – to identify and provide information on how to participate in nearby recreational activities available on the Niagara Escarpment

To promote the distinctiveness and visual identity of the NEPOSS, literature about it, as well as the Escarpment and the NEP, will be available at Nodal Parks.

The following ten Nodal Parks have been selected to serve segments of the Escarpment:

- Bruce Peninsula National Park
- Spirit Rock Conservation Area
- Inglis Falls Conservation Area
- Pretty River Valley Provincial Park
- Mono Cliffs Provincial Park

- Terra Cotta Conservation Area
- Crawford Lake/Rattlesnake Point Conservation Area
- Royal Botanical Gardens
- Dundas Valley Conservation Area
- Balls Falls Conservation Area

New Nodal Parks may be added or existing ones replaced without requiring an amendment to the NEP, provided that the MNR and NEC are satisfied that, following consultation with the public and the agency, such a modification would be consistent with the NEPOSS objectives and the Nodal Park concept outlined in the NEP.

A Nodal Park may contain facilities and support uses directly related to its administrative role in the NEPOSS, as outlined in section 3.1.2 of the NEP.



Bruce Peninsula National Park Visitor's Centre, Courtesy of Parks Canada

5.3 An Introduction to Parks and Open Space Zoning

Zoning, according to section 3.1.5 of the NEP, is essential to the planning, development and effective management of a park or open space area. Zoning is a process undertaken in the park and open space planning process that examines each specific geographic area within the protected area to determine:

- what natural heritage features and cultural heritage features exist;
- what permitted uses and development options will be allowed; and
- what management priorities and policies will be put in place for the future.

Zoning assigns uses to lands based on their significance for protection and their potential for recreation within the classification policy.

The Purpose of Zoning

Zones are intended to fulfill a variety of functions in a park or open space, including the following:

- Identification and recognition of the features and attributes
- Protection of key natural heritage features and cultural heritage features and functions
- Segregation of conflicting recreational activities by directing activities with higher impacts to the least sensitive areas and low-impact activities to areas that are more sensitive, if appropriate
- Delineation of areas on the basis of their requirements for management

- Standardization of the approach to support management objectives and actions, based on a variety of features
- Balancing of public use with the preservation of the natural environment
- Encouraging users to understand the parks or open space policies and to appreciate the unique contribution each park or open space makes to the NEPOSS

The land use designations of the Niagara Escarpment Plan and Development Criteria in Part 2 (of the NEP) will be used as a guide in the planning process instead of a final statement on permitted uses. Zoning developed through the park and open space planning process takes precedence over land use designations in the Niagara Escarpment Plan once a Parks Master/Management Plan is approved and not in conflict with the Niagara Escarpment Plan.

Niagara Escarpment Plan (2005), section 3.1.6.2

There are six zones in the NEPOSS, each of which serves a specific purpose and provides planning and management direction to agencies. Table 5.2 contains guidelines for zoning and planning. The six types of zone are as follows:

- Nature Reserve Zone
- Natural Zone
- Access Zone
- Historical Zone
- Development Zone
- Resource Management Zone

If zones other than those listed above are needed to resolve special planning requirements, agencies will be expected to provide supporting documentation and rationale when recommending a new zone category. Creation of a new zone

category as a result of the planning process will not require an amendment to the NEP but should be done in consultation with the NEC and the MNR.

The zones can be applied to all parks and open space classes, except in the case of Natural Zones, Development Zones and Resource Management Zones which are not permitted in the Nature Reserve class.

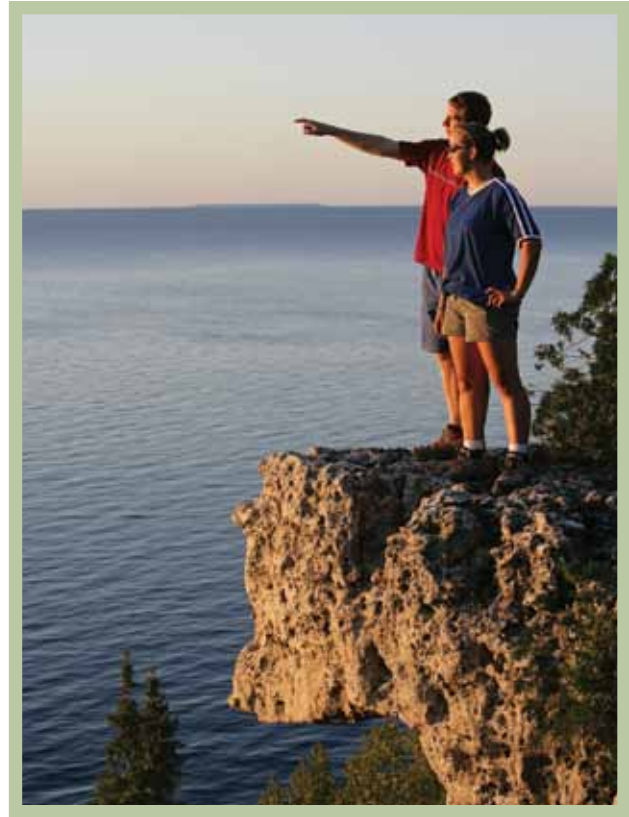
Niagara Escarpment Plan (2005), section 3.1.6

5.4 Zone Policies

All park and open space management plans will include zone policies, zone descriptions and a zone map.

- **Zone policies** – These provide the management direction and permitted uses for each zone. The permitted uses in table 5.2 can be customized through the planning process to meet the appropriate needs of the specific property.
- **Zone descriptions** – These provide a rationale for each zone based on information gathered in the research phase, distinguishing characteristics and any special management considerations (e.g., protection of cultural heritage features in Historical Zones). An approximate acreage (in hectares) of each zone should also be included in the zone description.
- **Zone map** – This provides a clear depiction of the identified zones and must include the park boundary, topographic features and existing infrastructure, such as buildings and major park roads.

As shown in figure 5.1, a zone map of Delphi Point Park, zones should be based on the best understanding of the significant and representative features of the park or open space. At the same time, zoning also recognizes the existence of ideal locations for nature appreciation and recreational opportunities; the Delphi Point Park Development Concept shown in figure 5.2 is based on the zones outlined in figure 5.1.



Bruce Peninsula National Park, Courtesy of Parks Canada

Note: *The Bruce Trail (either the existing or an optimal route) should be clearly identified on the map and will be managed in cooperation with the BTC.*

5.5 Establishing Zones

Zoning will be achieved through the park and open space planning process. To establish zones, it is necessary to distinguish among different degrees of ecological sensitivity on the landscape. Developing the site description, completing the resource inventory and conducting the information analysis will guide the assignment of zones in the park or open space. Zoning recognizes that every park includes a particular combination of significant resources, features and potential or existing development.

Table 5.2 NEPOSS Zones

Zone	Description	Management Direction	Permitted Uses (subject to management planning)
Nature Reserve	<p>Nature Reserve Zones include significant natural heritage features or areas that require careful management to ensure the long-term protection of their natural features.</p> <p>This type of zone should ensure ecological diversity and provide long-term protection for significant natural heritage features such as the following:</p> <ul style="list-style-type: none"> Habitat of endangered, threatened and rare species or species of special concern Wildlife and fish habitat Hydrological systems (e.g., streams, wetlands, ponds) Woodlands ANSIs <p>Escarpment features (e.g., brow, slope, face, toe, and related landforms)</p>	<p>Nature Reserve Zones are predominately natural and should contain naturally functioning ecosystems.</p> <p>Such zones should protect natural heritage features in the long term.</p>	<p>To protect, preserve and rehabilitate identified natural heritage features, visitor uses are limited or restricted.</p> <p>Development is generally restricted to trails, necessary signs, interpretative facilities (where warranted), temporary research facilities and conservation practices.</p>
Natural	<p>Natural Zones include aesthetic landscapes in which a minimum of development is permitted to support low- to moderate-intensity recreational activities.</p> <p>This type of zone includes natural landscapes and high-quality natural settings.</p>	<p>The Natural Zone can function as a buffer between Development Zones and Historical or Nature Reserve zones.</p> <p>Natural Zones are not permitted in Nature Reserve class parks.</p>	<p>Low- to moderate-intensity recreational activities are permitted.</p> <p>A minimal level of development (e.g., trails, backcountry campsites, necessary signs and minimal interpretive facilities) is permitted to support low-intensity recreational activities.</p>
Access	<p>Access Zones serve as staging areas (e.g., trailheads, parking lots) where minimal facilities support the use of Nature Reserve Zones and relatively undeveloped Natural and Historical zones.</p>	<p>Access Zones are intended to support the use of and access to adjacent zones.</p>	<p>Development may include minimal facilities to support Nature Reserve, Natural and Historical Zones. Examples include roads, signs, trailheads and parking lots.</p>

Zone	Description	Management Direction	Permitted Uses (subject to management planning)
Historical	Historical Zones include significant archaeological or cultural heritage features or areas that require management that will ensure the long-term protection of the significant features.	Management planning for archaeological or cultural heritage features may range from maintaining their present condition to restoring and/or reconstructing the site.	Development will include protection and interpretation of archaeological or cultural heritage features. Examples include interpretive, educational, research and management facilities, trails, signs, and historical restorations or reconstructions.
Development	Development Zones provide the main access to the park or open space, and facilities and services to support the recreational activities available. This type of zone may allow for the development of visitor and park facilities.	A Development Zone is usually oriented to the provision of recreational opportunities that are suited to the natural character of the particular park or open space and are conducted in an environmentally sustainable manner. This zone should have minimal negative impact on natural heritage features and cultural heritage features, the natural landscape or watersheds. Development Zones are not permitted in Nature Reserve class parks.	Development may include roads, parking lots and gates, beaches, picnic areas, campgrounds and commercial service facilities, and orientation, interpretive, educational, research and maintenance facilities. Development of facilities must be designed and undertaken in a way that will minimize their environmental and visual impact.
Resource Management	Resource Management Zones include certain public lands that are managed primarily to provide resource-related benefits such as forest products, fish and wildlife, or flood control. Previously disturbed sites (e.g., abandoned quarries, old fields) where active measures are being taken to re-establish natural vegetation should also be considered for this type of zoning. This type of zone may include land that has traditionally been managed under long-term resource agreements (e.g., forest management agreements or agricultural leases).	Resource Management Zones are sustainably managed for many diverse values, such as wildlife, fisheries, forestry and outdoor recreation. Such zones may be places for experimenting with alternative resource management practices and developing a better understanding of ecosystem structures and functions in a scientifically sound manner. This zone should demonstrate exemplary conservation and stewardship. Resource Management Zones should not be established in Nature Reserve parks, provincial parks or in life science ANSIs, except as noted in section 3.1.5 of the NEP.	Resource Management Zones may be used to demonstrate ecologically sustainable resource management practices. Establishing permanent research plots for monitoring purposes (e.g., permanent sample plots for growth and yield studies) is encouraged in these zones. Water may be controlled for purposes related to flood protection, watershed management or municipal water supply. The recreation uses of Resource Management Zones are subject to park management planning.

Figure 5.1 Example of a Zone Map – Delphi Point Park



Legend

-  Nature Reserve Zone
-  Natural Zone
-  Access Zone
-  Development Zone

* Property boundary and wave uprush limit from drawings provided by C. F. Crozier & Associates Inc. for Peaks Bay Holdings, File no. 107-2507.



ZONING

Delphi Point Park Management Plan

0 20 40m

Figure 5.2 Example of a Development Concept Map – Delphi Point Park



5.6 The Bruce Trail



Mount Nemo Conservation Area, Courtesy of Halton Conservation

The Bruce Trail is the oldest and longest continuous footpath in Canada. It runs along the Niagara Escarpment, spanning more than 850 km of main trail and 250 km of side trails. The NEP recognizes the Bruce Trail as an essential component of the NEPOSS as the corridor provides continuous public access to the Escarpment and connects to the majority of the parks and open spaces. The long term goal is to secure a permanent corridor for the Bruce Trail along the Escarpment's entire length.

The Bruce Trail Conservancy is a charitable organization committed to establishing this conservation corridor in order to protect its natural ecosystems and to promote environmentally responsible public access to this World Biosphere Reserve.

Bruce Trail – A continuous footpath from Queenston to Tobermory on which users can experience on foot the scenic, natural, wooded, pastoral and culturally significant areas of the Niagara Escarpment.

Bruce Trail Corridor – Property managed and/or acquired in whole or in part under Part 3 of the Niagara Escarpment Plan or by other means for the purpose of securing the Bruce Trail and facilitating the establishment of Overnight Rest Areas and Bruce Trail Access Points.

Niagara Escarpment Plan (2005), Appendix 2

With consideration to section 3.1.3 of the NEP, the planning, design, development, maintenance and management of the Bruce Trail will be implemented in accordance with the provisions of the NEP and management agreements with partner agencies.

In accordance with section 3.1.6 (5) of the NEP, when the Bruce Trail Conservancy (BTC) has identified the existing and optimal route of the Bruce Trail, it must be identified in management plans. An agency, in collaboration with the BTC, will make final decisions with regard to the location of the trail, access points and overnight rest areas.

The Bruce Trail is permitted in most park classifications and zoning areas. However, the Bruce trail should be designed to avoid impact on natural heritage features and cultural heritage features of local, regional, and provincial significance.

The Optimum Route

The optimum route is defined as the most desirable route for the Bruce Trail. The optimum route follows the edge of the Niagara Escarpment but may also be placed inland from the Escarpment brow, or pass below the brow, as ecological or geological considerations dictate. Generally the optimum route of the Bruce Trail is not more than 100 m from the Escarpment brow, but that span may increase or decrease depending on ecological considerations, terrain, existing structures, etc.

According to NEP section 3.2 where the route of the Bruce Trail does not follow the optimum route or where the optimum



Bruce Trail near Burlington, Courtesy of Bruce Trail Conservancy

route has become available because the opportunity for acquisition has occurred, the method of securing the Trail will be fee simple acquisition and lesser rights will be acquired where appropriate. Acquisition will occur on a willing seller/buyer basis.

The optimum route of the Bruce Trail shall be determined by the Bruce Trail Conservancy and the Development Criteria in section 2.16 of the NEP. The process of final corridor selection and acquisition from willing sellers shall include consultations with partner agencies.

The policy objective of 2.16 of the NEP (2005) is to design and locate uses within the Bruce Trail corridor in an environmentally sound manner, direction includes:

- The trail and its associated infrastructure should be designed and located within the corridor so as to:
 - Minimize potential conflicts with adjacent private landowners and surrounding land uses (e.g. agriculture, housing); and
 - Comply with municipal official plans and by-laws (where applicable).
- All uses within the corridor should be designed with consideration to the protection of natural heritage features and cultural heritage features and with minimized impact to those features
- All Trail activities shall be compatible with the natural heritage features and cultural landscape, avoiding wherever possible the need for major engineering works and site modifications over the long term.
- In locations which are particularly sensitive to foot traffic, or which experience heavy use, periodic reroutes of the Trail may be necessary to allow for natural regeneration and minimize negative environmental impacts.
- All uses within the Trail corridor shall be located and designed, where possible, to avoid steep slopes, wetlands, erosion prone soils and ecologically sensitive areas such as sensitive plant and animal habitats and sensitive areas within Areas of Natural and Scientific Interest.



Overnight Rest Areas

Overnight Rest Areas – property managed and/or acquired by the Bruce Trail Conservancy or through agreements with landowners or public agencies for the purpose of allowing small basic unserviced camping sites for Bruce Trail users.

Niagara Escarpment Plan (2005), Appendix 2

Section 2.16 of the NEP provides the following direction on the development of overnight rest areas:

- Overnight Rest Areas should not be sited closer together than 10 kilometres (6.3 miles).
- Locational preference for overnight rest areas will be given to their development outside Escarpment Natural Areas on existing public parkland within the NEPOSS or on properties owned by the BTC.
- Overnight rest areas should be managed as unserviced campsites. Such an area would normally consist of three to six clearings for tents, a fireplace, water source and latrine. Municipal/Provincial regulations governing fires, water supplies and waste disposal should be followed.
- To discourage abuse by non-hikers, overnight rest areas should be located off the main Bruce Trail, and scenic or historic attractions. A minimum 500 metre (1,650 foot) separation from roads and other points of vehicular access will normally be required.

Bruce Trail Access Points

Bruce Trail Access Points – Property managed and/or acquired in whole or in part for the purpose of providing public access to the Bruce Trail (e.g. parking areas).

Niagara Escarpment Plan (2005), Appendix 2

The development of Bruce Trail access points shall be subject to the General Provisions of section 2.16 of the NEP and the following:

- Locational preference for Bruce Trail access points will be given to their development outside Escarpment Natural Areas on existing public parkland within the NEPOSS or on properties owned by the Bruce Trail Conservancy.
- Secondary Bruce Trail access points may occur between Escarpment parks or open spaces provided the following design standards can be met:
 - Secondary access points should generally be located within 500 metres (1,650 feet) of the Bruce Trail and be connected by a side trail;
 - Secondary access points should be limited in size and accommodate a maximum of 20 vehicles;
 - Where necessary secondary access point parking areas should be fenced and visually buffered with berms and/or vegetative screening;
 - Secondary access points shall not be established in remote areas, or near sensitive areas or features where natural and cultural values might be endangered or compromised by increased public access; and
 - The location and design of secondary access points shall satisfy all municipal and provincial road access requirements (e.g. sight-lines, drainage).

6.0 PUBLIC CONSULTATION

Public consultation is an opportunity for agencies to involve the public and stakeholders in the management planning process of a park or open space. As the management plan is being developed, agencies should gather input from members of the public and stakeholder groups on the natural heritage features and cultural heritage features and issues of interest to them. Such input is an important part of planning during the research and analysis phase of the planning process, as well as during the decision-making phase.

Each public consultation process is unique and should be designed to meet the needs of the public and interested and affected parties. The type and frequency of public consultation depend on the planning context and complexity of issues concerning the site. While consultation may take different formats (e.g., opportunities to view planning documents online, open houses, workshops), it will provide open and transparent opportunities for input and for access to information, planning proposals and their impacts, and include the reasoning behind the decisions made.

6.1 The Benefits of Undertaking Public Consultation

For agencies, the main benefit of gathering public input and exploring different viewpoints is to help them make balanced planning decisions that support the sustainable long-term planning direction of the park or open space. Agencies can use public consultation as an opportunity to explain the planning process, confirm the natural heritage features and cultural heritage features, as well as existing pressures, and discuss proposed management direction. Consultation also provides an opportunity to hear the views, concerns and recommendations of the public and stakeholders. By communicating regularly, agencies can ensure that the public and stakeholders are aware of the planning process and their opportunities to provide comments. Consistent communication also builds strong relationships, which are

critical for the implementation and long-term success of the management plan.

Tip

Interested parties are more likely to accept and support the management plan if they have been involved in its development and their concerns have been considered.

6.2 Inclusiveness in the Public Consultation Process

To understand community interests in the park or open space and build support for the planning process, public consultation at various stages in the planning process should involve all parties with an interest or concern in the park or open space. They may include:

- parties involved in the management of the park or open space;
- parties who use the park or open space;
- interested communities, stakeholders and local user groups (e.g., schools, colleges, universities, local interest groups);
- the BTC;
- the immediate community – people who live in, near or around the park or open space, including assessed owners of land within 120 metres of the park or open space;
- elected members, boards or senior management responsible for making higher level strategic decisions



Dundas Valley Conservation Area, Courtesy of Hamilton Conservation Authority

that affect the park or open space (e.g., people involved in setting annual budgets); and

- approval authorities and planning agencies (e.g., the NEC, the MNR, municipalities, conservation authorities).

6.3 Determining the Appropriate Level of Public Consultation

Public involvement will depend largely on the size and complexity of the management plan but could range from providing advice and input (e.g., on existing or proposed recreational uses, park infrastructure, or park programs) to reviewing material such as the research and inventory results.

The planning team should determine the extent of public consultation needed on the basis of planning issues, the controversy surrounding proposed development options, and the interests of individuals and/or agencies involved in the park or open space. Once an agency has presented several development options at community workshops, a follow-up workshop should be scheduled to present the recommended/finalized option.

6.4 Incorporating Public Consultation into the Management Planning Process

As the agency moves through each phase of the planning process, opportunities and issues may arise that will trigger public and stakeholder interests in the management planning process.

Whenever it occurs during the planning process, the public consultation process should be transparent, accessible, accountable and timely. Public consultation can take many different formats, and agencies should consider which format will best meet their needs and the needs and desires of the public and stakeholders. This could mean posting planning material on a website, placing advertisements in newspapers, or holding open houses or local meetings to discuss management plans and options. Table 6.1 describes suggested techniques for public consultation. Regardless of what techniques agencies use, open and clear communication is key to successful public consultation.

Table 6.1 Public Consultation Techniques*

I: Informing IG: Information gathering EP: Engaging Participation CP: Creating Partnerships

Technique	Description	Purpose of Consultation
Mail/email notices	Direct mailing to interested parties can be used to provide them with a description of the project and information on how they can become involved.	I
Newspaper/radio ads	Placing ads about a project in newspapers or on the radio can inform a wide variety of people in an accessible manner.	I
Notices posted in the park or open space	Placing an information display at the park or open space informs people who use the area.	I
Website postings	Posting information on the agency website will provide accessibility to current draft management plans, maps, and other related documents.	I
Social media	Web-based and mobile technologies such as Facebook, Twitter, social blogs and podcasts enable interactive dialogue.	I IG EP
Attendance at local meetings	In some cases, attending a meeting of a local interest group may be appropriate. Depending on how the meeting is structured, this technique can provide insight to the group's goals and objectives and how they may be considered during the management planning process.	I IG EP CP
Surveys	Online or paper surveys provide an alternate medium to receive comments and recommendations on the draft management plan or to build the visitor profile.	IG
Requests for comments/input online or via mail	Requests for comments/input posted on a website or sent via mail allow interested parties to provide their thoughts on the planning process.	IG
One-on-one discussions	Discussions with interested parties can be used to gain an understanding of their interests and knowledge.	IG EP
Group discussions (e.g., workshops, working groups)**	In addition to gathering information from individuals, group discussions allow for the development of common understanding between participants.	EP
Site visits	Visiting the park with interested parties can allow both them and the agency to ask and answer questions.	EP
Moderated online discussion forums	Such forums allow interested parties to share information and discuss interests that are important to them.	EP
Open houses	Open houses can include a formal presentation of information and an opportunity for interested parties to speak with planning staff. Two-way information sharing can result.	EP
Joint decision making	Two or more parties who are equal partners in planning must agree on all decisions made.	CP

**Adapted from the Ontario Parks draft Public and Stakeholder Involvement Guideline (2009)*

***Discussion groups can come in many forms (e.g., workshops, charrettes, working groups), but their outcomes are generally the same; common understanding. When people are brought together to discuss challenges, input, thoughts and opinions can be discussed and examined by the group; efficiently and effectively resolving concerns.*

Tip

Recording the comments received from members of the public and stakeholders is essential during the public consultation process. A database is a useful tool for tracking comments and actions taken in response to them.

In addition to developing a common understanding, the advantage to using discussion groups is that they can develop a higher level of expertise in planning and the planning project. Discussion groups are better able to focus on the landscape level perspectives affecting a park or open space rather than individual positions and can act as ambassadors to the groups they are associated with. Group members also become advocates as they are invested in the project compared to others who may learn of the project for the first time on the website or at a public meeting.

Those administering the group could also choose to seek the advice of existing committees such as Stewardship Councils, Local Citizens Committees or Regional Advisory Committees.

Tip

After the agency has circulated the management plan with the recommended option, the public and stakeholder involvement for the planning project is normally complete. In some cases, however, issues relating to the proposed development option and subsequent proposed resolution may require further consultation. It may involve all known planning participants or be scoped to those who have a particular interest in or will be affected by a proposed change.

6.5 Consultation Information to Include in the Management Plan

A brief summary of the public consultation should be included in the management plan and should note the following:

- Information made available for public review
- Dates and the location of public meetings, the location of information centres, and so on
- A summary of participants (e.g., individuals, stakeholders, community groups)
- A summary of major issues and their resolution, including
 - highlights and a brief description of major issues that arose during consultations
 - a description of the resource/area affected
 - the range of management/development solutions and alternatives considered
 - a statement on how the management plan has addressed the issue

It is important to focus on the significant concerns, what people had to say about them and how the management plan addresses those concerns.

7.0 MONITORING, REVIEW AND EVALUATION

Monitoring and evaluating the success of management plan allow agencies to ensure that its goals and objectives and its commitments to resource management actions are being reached.

Monitoring activities are important for:

- evaluating the implementation of the management direction;
- determining the effectiveness of management actions; and
- adjusting the management plan, as required, based on that information.

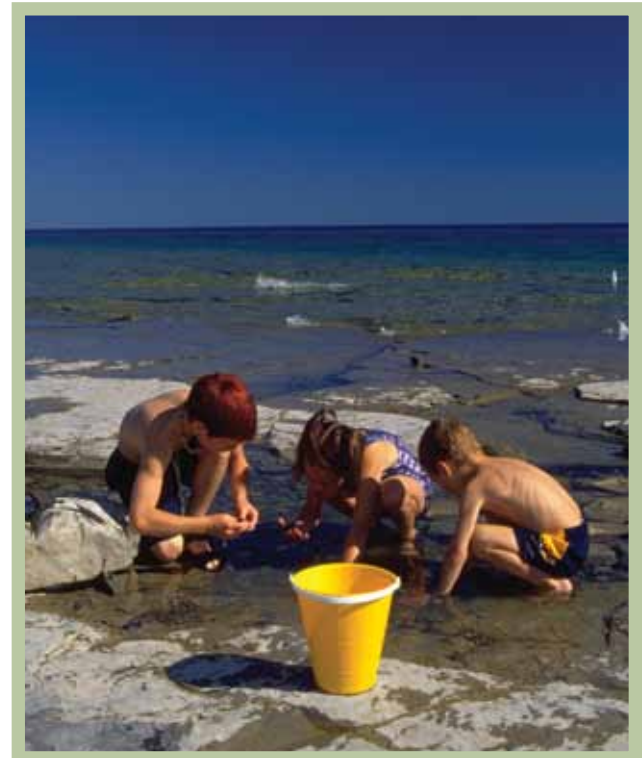
The legal obligations of a park or open space (e.g., obligations relating to species at risk) and the protection of its natural heritage features and cultural heritage features should be the primary focus of monitoring efforts. Monitoring can also help the agency learn from experience and adapt existing strategies, thereby improving its ability to manage protected areas successfully. This is called adaptive management.

Determining how the success of the management plan will be evaluated needs to be considered during the process of developing the management plan. After setting planning goals, it is important that agencies consider what information will be required to determine whether the plan is successful in meeting those goals. For example, to be able to demonstrate a positive change in the status of a natural heritage feature or cultural heritage feature over time in a manner that can be repeated in the future requires that data on the current state of the feature be gathered before the management plan is implemented.

The consequence of not planning for monitoring projects before a plan is implemented is that managers struggle to find performance measures that are supported by reliable data and evidence to inform future planning and protection efforts.

7.1 Monitoring the Implementation of Management Direction

Monitoring answers the question “Did we do what we said we would do?” Essentially, monitoring is an audit of performance and could be applied to all actions and policies associated with the management direction. The audit assesses whether implementation has been successful or whether a new direction and actions need to be taken.



Craigleith Provincial Park, Courtesy of Ontario Parks

7.2 Evaluating the Effectiveness of Management Actions

Monitoring can also answer the question “Were our actions effective?” Through monitoring, managers are able to learn, share information about successes or failures and adapt as necessary and as resources are available. This assessment is an essential component of an adaptive management approach.

7.3 Reviewing and Updating of Other Items

The following should also be reviewed and updated periodically:

- The background information document
- Current and emerging issues, and new or changing priorities
- Management of visitors and their impact on the park or open space

7.4 Setting Monitoring Priorities

To set their monitoring priorities, agencies need to consider the various pressures and their impacts (including management decisions and associated actions) on the park or open space as a whole and on the condition of specific features.

Monitoring provides a means to track changes in the condition of site features over time and can serve as an early warning of undesirable changes in the condition of a feature.

Monitoring answers the question “What is the condition of the feature?” and further analysis through the monitoring process may identify existing and potential threats to the feature.

The management plan should describe monitoring needs to consider as capacity and resources allow. Table 7.1 shows the five general steps in setting priorities for monitoring the effectiveness of management direction.

Table 7.1 Steps in Setting Priorities for Monitoring the Effectiveness of Management Direction

Step 1	Establish a clear understanding of what types of information would be required to determine the success of actions contained in the management plan
Step 2	Determine what park or open space values will be monitored and the current condition of those features
Step 3	Identify what pressures and their underlying causes are adversely affecting the park or open space
Step 4	To determine the priorities, assess the level of risk posed by the pressures on the identified features
Step 5	Identify monitoring methods and performance indicators

8.0 FINALIZING THE MANAGEMENT PLAN



Courtesy of Ontario Parks

Taking into consideration all the information and opinions gathered throughout the planning process, management plans will set out the vision for the park or open space, and identify a desired end state and the steps required to achieve it.

8.1 Suggested Content of the Management Plan

The following list of topics that might be contained in a management plan is not definitive. Agencies may include all or some of the topics listed below or include additional topics:

- **Summary of the Planning Area**

- Identification of where the park or open space is located and a brief description of its distinct features (e.g., area history, size, natural heritage

features, adjacent properties, how it builds on natural corridors and related transportation routes)

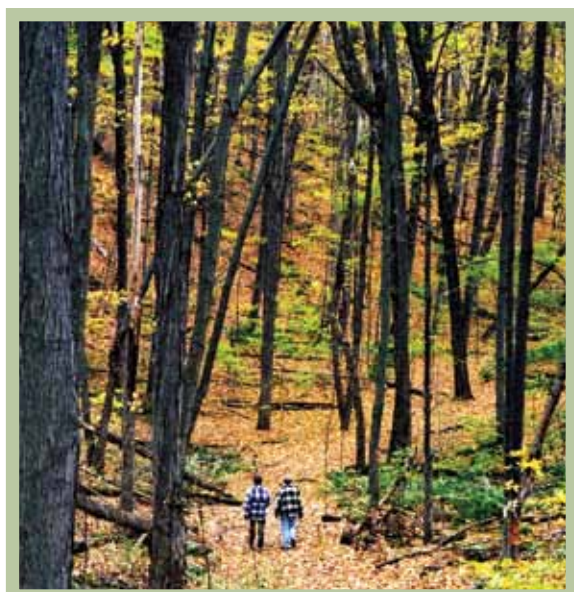
- A description of the classification of the park or open space and its role and significance in the context of the NEPOSS
 - Visual aids to describe the planning area, which may include:
 - regional maps
 - property site maps
 - aerial photographs
 - NEP designations
 - Goals and Objectives
 - A list of goals and objectives adapted or expanded from the original goals in the project charter and modified as necessary as a result of the planning process outcomes
- **Overview of the Planning Process**
 - A brief summary of the planning steps followed and outlined in the project charter
 - **Background**
 - Information taken from the information gathering and research phase and the related summary report
 - Mapping of natural heritage features, cultural heritage features, recreational uses and existing infrastructure

- **Environmental Considerations and Management Issues**

- The identification of considerations and issues based on inventories, assessments, community input, etc. (e.g., site restoration, environmental site assessment, recreational activities, archaeological assessment)

- **Management Policies**

- A general statement of policy about the management challenges and the recommended policies to protect, plan, develop and manage the significant resources and features of the property
- An explanation of how planning and management activities contribute to the purpose, vision and site objectives of the park or open space, and to its achievement of ecological integrity, environmental protection and sustainability, and of how decisions are responsive to public or stakeholder interests
- Identification of permitted uses and activities
- Strategic direction or vision for the future of the park or open space



Hockley Valley Provincial Nature Reserve, Courtesy of Ontario Parks

- **Public Consultation**

- A brief summary of the public consultation, with a reference to a detailed listing of the participants, key issues, comments and resolution of issues in a public consultation appendix in the management plan.

- **Development of the Park or Open Space Concept**

- A description of the development concept for the park or open space and the nature and location of proposed facilities and improvements
- A map outlining the development concept, supplemented with additional maps, if needed, and supporting text
- In the case of agencies undertaking a phased development strategy, phased development maps and text for planned future development that demonstrate what the park or open space will look like at each stage of the phased implementation process (e.g., two-year map, four-year map, six-year map)

- **Monitoring and Review of the Management Plan**

- Intended direction for monitoring and assessing the resource management, development and operations activities

- **Financial Considerations**

- The financial considerations may detail how management plan projects will be financed and where resources will be assigned as well as estimated costs for completion of the management plan. This component is meant to support the agency's coordination efforts and not for public circulation.

9.0 MANAGEMENT PLAN APPROVAL

9.1 Management Plan Approval Process

When stakeholders, the public and agency advisors (the MNR and the NEC) have reviewed an agency's final draft management plan and outstanding issues have been resolved, the agency must then submit its management plan to the NEC for endorsement and to the MNR for approval.

Tip

Before seeking endorsement and approval for a management plan, agencies are encouraged to seek advice from both the NEC and the MNR (Natural Heritage and Land Use Planning Section) throughout the management planning process, to help identify and resolve potential conflicts regarding conformity with NEP policies and/or issues with the management plan.

The approval process is as follows:

1. NEC staff review the final draft management plan.
2. NEC staff prepare a report outlining whether the management plan conforms to the NEP and provides its recommendation to the NEC:
 - If the NEC endorses the management plan, the director of the NEC signs the approval statement and forwards it to the MNR, along with the NEC staff report, for final review.
 - If a management plan does not conform to the NEP, the NEC will provide specific feedback and advice to the agency.

A copy of the NEC staff report is sent to the MNR and the agency.

3. The MNR reviews the final management plan and NEC staff report.
4. The MNR then selects one of the following options:
 - The management plan conforms to the general intent and purpose of the NEP and is approved.
 - The management plan conforms to the general intent and purpose of the NEP, but some conditions need to be addressed before approval.
 - The management plan is in conflict with the general intent and purpose of the NEP, and changes must be made before approval (the MNR will specify the necessary changes).
5. The Director, MNR Natural Heritage, Lands and Protected Spaces Branch, approves the plan and signs the approval statement; a signed approval statement is directed to the agency and the NEC.

What to Submit for Management Plan Approval

Completed management plans are submitted to the NEC along with three approval statements signed by the person in the agency with authority for approving the management plan. Approval statements should be brief and contain the following elements:

- A brief description of the park or open space
- Other relevant information
- Signatures of approval

An approval statement should appear in all approved management plans for public lands in the NEPOSS.

Appendix C contains an approval statement template.

9.2 Management Plan Approval Processes for Other Government Bodies That Manage NEPOSS Parks

Ontario Provincial Parks

If Ontario Parks has approved management plans or management statements for an Ontario provincial park and they conform to the NEP, they qualify as management plans under the NEP. After the NEC and MNR review, the MNR will issue a letter stating that the management plan or management statement conforms to the NEP. The NEC and

the MNR, Natural Heritage and Land Use Planning Section, must review Ontario Parks management plan amendments that propose changes to or expansion of existing uses. Sections 3.1.4 and 3.1.6 of the NEP are to be followed when preparing or revising a management plan.

National Parks and Federal Lands

Parks that are managed by Parks Canada and the St. Lawrence Seaway Authority are not subject to provincial legislation. Those agencies are partners in the NEPOSS and have indicated that their park planning, management and development will conform to the greatest degree possible with the general intent and purpose of the NEP and the NEPOSS guidelines. Parks Canada and the St. Lawrence Seaway Authority will provide the MNR and the NEC with copies of all draft and preliminary park management plans for review and comment, as well as copies of the approved management plans.



Ball's Falls Centre for Conservation, Courtesy of Stephen Dominick and Niagara Peninsula Conservation Authority

10.0 IMPLEMENTATION OF THE MANAGEMENT PLAN

It is recommended that agencies incorporate in their management plan an approach for overseeing its implementation. The zone policies and map(s) that agencies have created during the planning process will be useful tools to help develop the longer term direction for implementing land use planning and resource management activities.

One approach that has proven to be successful is for a management planning team to meet quarterly or biannually to oversee the delivery of the operational work plan.

Planning teams, in their meetings, could consider the following implementation components:

- Determining what protection activities are the highest priority
- Developing an approach for phased development in the park or open space
- Identifying the need for communication plans at various stages
- Setting and modifying annual work-planning commitments
- Overseeing the monitoring and evaluation of projects to determine the need for improvement of management policies and practices by learning from the outcomes of their application (i.e., adaptive management)

Approaches may vary, but clearly articulated accountability for the implementation of the management plan, within the plan itself, is critical to achieving the vision for the park or open space.

10.1 Communications

After the management plan has been approved, agencies should communicate that the plan is complete and readily available to the public and stakeholders (e.g., post the document on the agency website, issue a press release). The agency should look for opportunities to inform partners and the public about the importance of the approved management direction, how to interpret it and its implementation strategy.

10.2 Work Planning

In order for management plans to be implemented, agencies may wish to create and use annual operational work plans. At a minimum, these work plans should establish implementation priorities for the year, and define roles and outline responsibilities for each action, as well as timelines for completion and the budget.

10.3 Application of the Adaptive Management Approach

Ecosystems are complex and dynamic, so predicting how they will respond to management actions and human use is difficult. Despite these uncertainties, however, management decisions (to either take action or not) must be implemented. Adaptive management allows managers to proceed responsibly in the face of such uncertainty. Adaptive management can be visualized as a five-step cycle including design, implementation, monitoring, evaluation and adjustment.



Courtesy of City of Hamilton

Whether a project is simple and straightforward or very complex (e.g., ecosystem management), the need for adaptive management approaches based on effective monitoring and evaluation should be considered when evidence suggests that not everything is going according to plan. Agencies may wish to work with ecologists and other specialists to design adaptive management approaches, when needed, in the more complex cases.

10.4 Development in the NEPOSS

Some level of development may have been proposed in the approved management plan. To ensure conformity with the NEP when moving forward with the development of a project, the development requirements as outlined in the NEPDA and NEP must be followed.

Development includes a change in the use of any land, building, or structure.

Niagara Escarpment Planning and Development Act (1973)

Development Permits

Agencies considering a proposed development should first contact the NEC to determine whether a development permit for it is required.

The NEC may, at its discretion, streamline or eliminate the development permit process if the agency's approved management plan contains a detailed development strategy or concept plan for the proposed development.

Note: If an NEC development permit is required, it must be obtained before any other approvals.

In circumstances where municipalities and ministries that have properties within the NEPOSS do not require an NEC development permit, it is recommended that development plans be forwarded to the NEC for review and assessment of compliance before their implementation.

If a development permit is required, agencies will follow the process laid out by the NEPDA. The NEC has the delegated authority to make decisions on development permits and will ensure that the provincial interest in the NEP and the NEPOSS is protected.

Note: Proposed development in an approved management plan does not automatically mean that a development permit will be issued. Each proposed development will be assessed individually to determine whether it is consistent with the NEP, the NEPOSS and the management plan.

Demolition

The proposed demolition of a structure or partial structure or landscape alteration in the NEPOSS may require a development permit from the NEC.

10.5 Land Acquisition and Land Removal

Where land is acquired to add to an existing park or open space, it is considered public land in the NEPOSS and is subject to the policies of the NEP. Agencies should provide to the NEC and the MNR a map illustrating the revised park boundaries so that the NEP maps remain current and accurate.

The removal of lands from the NEPOSS does not require an NEP amendment except under limited circumstances (see section 3.4 of the NEP). Agencies seeking to remove lands from the NEPOSS should contact the NEC and the MNR as a first step.

11.0 AMENDMENTS TO THE MANAGEMENT PLAN

Management direction and site-specific policies are typically prepared for a 20-year period. The agency should monitor the implementation of management direction continually, with reviews at 10-year intervals, in an effort to keep the plan current and relevant. Requests for a plan review or specific changes may also arise from the public or stakeholders at any time throughout the term of the management plan.

11.1 Management Plan Amendment Process

Amendments or changes may be necessary during the term of the management plan when unforeseen circumstances arise or new information becomes available. The management plan approval and amendment processes apply to such changes.

The Nature of Amendments

Amendments are proposed changes to the management plan and its policies. Proposed changes may have a significant effect on the environment of the park or open space, and on adjacent landowners or users, or may result in a significant public reaction on a local, regional or provincial scale.

The following are examples of circumstances that might require an amendment:

- A major commercial tourism development
- A new park zone
- Adjustments to zone boundaries
- New trails or recreational uses
- A significant change in resource management or prescriptions for a zone
- Prohibition of a permitted activity*



Glen Haffey Conservation Area, Courtesy of Toronto Region Conservation Authority

*Note: If a permitted activity is causing harm to humans or having a significant impact on the environment, the agency may take immediate action to prohibit the permitted activity and will then notify the MNR, the NEC and any affected parties.

Approaches for an Amendment to an Approved Management Plan

The amendment approach will vary depending on the types of changes being proposed. Changes that are generally in keeping with the spirit and intent of the existing management plan usually only involve notifying the NEC and the MNR (a formal planning process or management plan amendment is not needed). Major changes to a park or open space will require a formal planning process and an amendment to the management plan.

Process for Making Amendments

Agencies should notify the MNR and the NEC of the proposed amendment. Specific planning and public consultation requirements will depend on the nature and scope of the amendment being considered.

If a proposed amendment affects only a portion of the park or only a segment of park users, consultation about the amendment to the plan may be scoped to include only the affected stakeholders (e.g., owners of adjacent lands, park or natural space volunteers, trail users, local municipalities). Public notice is recommended.

Proposals for amendments should be evaluated by the MNR and NEC to determine the following:

- The nature of and rationale for the amendment
- Conformity with legislation and provincial policy and the overall vision, purpose and objectives for the park or open space
- Whether the amendment is urgently needed or can be deferred (e.g., until the 10-year review of the management plan)
- The expected degree of public or stakeholder interest or support
- The extent to which similar issues may have been considered and deferred either in the initial development of the management direction or through a recent request
- The agency's capacity to address the proposal (e.g., finances, staffing and information)

Notice of Approved Amendments

At a minimum, notification of an approved amendment should be sent, by mail or email, to all parties on the mandatory contact list and placed on the agency website.

Approved amendments should be added to the agency's information repository and inserted or attached to printed copies of the original management plan. As well, they should be inserted into the electronic master version of the management plan and placed on the agency website.

Administrative Amendments

An administrative amendment could be a clarification, addition, deletion or other change to an approved management direction. Such an amendment is considered a minimal or modest change to an existing management direction and may fall into one or more of the following categories:

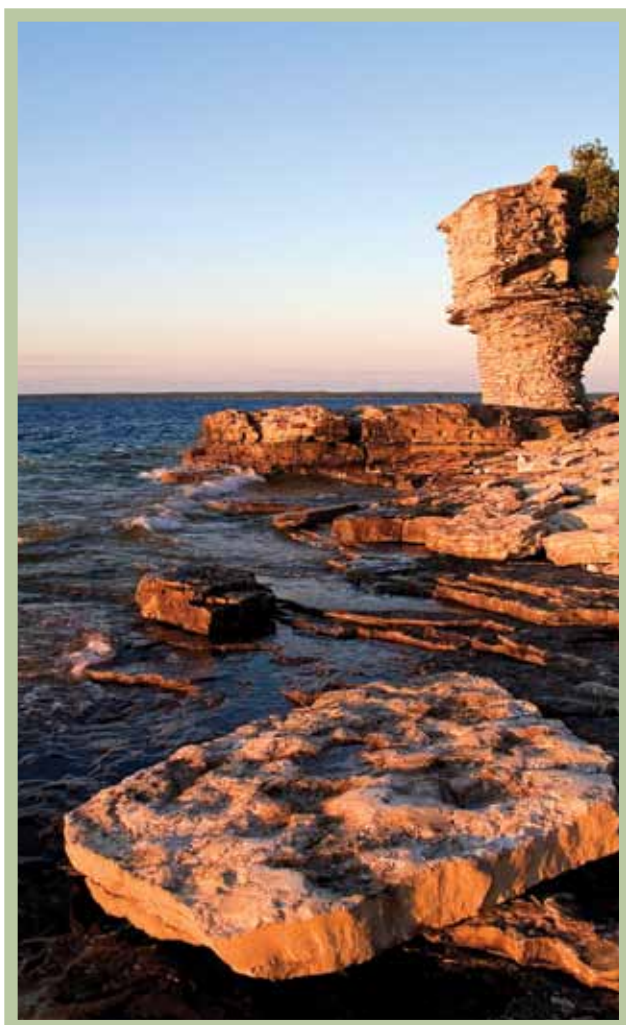
- Is required to keep management direction current and relevant while not changing the majority of the existing management direction
- Makes no substantive policy change to the existing management direction
- Deals with matters that are not environmentally significant
- Corrects or clarifies the intent of a policy statement
- Addresses some error or omission
- Is expected to have little or no interest to the public or stakeholders

Formal documentation is not required when processing administrative amendments.

The agency may defer administrative amendments until future amendments or revisions of management direction are undertaken.

Administrative amendments do not require public and stakeholder involvement or notification. It may be prudent, however, for agency staff to advise potentially interested parties, by appropriate means, when contemplating administrative amendments.

Administrative amendments will also be inserted into the electronic master version of the management direction and placed on the agency website.



Fathom Five National Marine Park, Courtesy of Parks Canada

11.2 Making Changes to Park Management Activities When No Approved Management Plan Exists

If the agency does not have an approved management plan for the park or open space, any proposed change in the use of the park and open space must take into account the following:

- The NEPOSS policy directives in Part 3 of the NEP
- The underlying NEP designation and NEPOSS park classification
- The requirements for a development permit under the NEPDA (e.g., for construction, demolition or removal of facilities, new infrastructure or recreational uses)
- The input and advice of the public and stakeholders from consultation undertaken on the proposals

12.0 REVISIONS TO THE NEPOSS PLANNING MANUAL



Nottawasaga Bluffs Conservation Area, Courtesy of Nottawasaga Valley Conservation Authority

As required, the MNR may revise the manual from time to time. A revision or modernization will be based on the best information available at the time. The MNR may append minor and major revisions as an addendum to this manual. Alternatively, the MNR may incorporate revisions directly into the text. The MNR, Natural Heritage, Lands and Protected Spaces Branch, will maintain a master copy of the manual, as well as a consolidated version on the MNR and NEPOSS Council websites. Agencies will be able to download addendums to the manual.

A number of supplementary tools and guidelines to the manual may be developed to modernize or recommend efficiencies in parks and open space planning. The MNR will manage these materials independently of the manual, and they may be changed, created or deleted at the MNR's discretion, with agency involvement.

A WORD OF THANKS

Thanks go to the NEC and its staff and to members of the NEPOSS Council for their help in developing this manual.



Christie Conservation Area, Courtesy of Hamilton Conservation Authority

APPENDIX A – Project Charter Outline

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APPENDIX A – Project Charter Outline

1.0 INTRODUCTION

This guide, which supplements the Niagara Escarpment Parks and Open Space System Planning Manual (2011), will assist agencies in scoping a management plan and is flexible enough to be adjusted to local situations.

The general steps in preparing a management plan are outlined here. The guide is not a template for management plan authors to simply fill in the blanks. Instead, it outlines the components that may be incorporated into a project charter. Authors may work on the components in any order.

1.1 Project Charter Content

The project charter should include the name of the park or open space, its NEPOSS classification and a brief description of the distinct features of the park or open space. The project charter should link practical actions to clear, site-specific objectives, which will enable achievement of the vision. A full-page map should be included to identify the location and boundaries of the park or open space to which the project charter relates.



Limehouse Conservation Area, Courtesy of Credit Valley Conservation Authority

2.0 PLANNING CONTEXT

This section provides guidance on the rationale for initiating management direction and the purpose for the park or open space.

2.1 Rationale for Planning

Some of the reasons for initiating management planning may be:

- To meet requirements of the Niagara Escarpment Plan
- To address local/regional issues
- To provide direction for management
- To integrate planning across more than one park or open space (a grouping)
- To address the results of monitoring
- To respond to a proposal from the public, a partner or another proponent
- To update, amend or rewrite management direction as identified in an examination of current management direction

2.2 Purpose Statement

Formulating a purpose statement early in the process sets the context for planning. Such a statement defines the most important values in the park or open space, thereby helping to focus analysis and decision making on recreational activities and pressures that may negatively affect the park or open space.

Describing how the park or open space is representative of the Niagara Escarpment's natural regions, its provincially significant natural or cultural heritage values, including its contributions to ecological integrity and the opportunities it presents for sustainable recreation will provide the context for planning. Other directions, such as the area-specific land use intent described in land use planning documents or determined through a land use planning process, will also help frame the purpose statement.

In establishing the purpose statement, the agency may wish to consider the following:

- Why was the park or open space created? What is its role in the Niagara Escarpment Parks and Open Space System?
- What ecosystems and natural, cultural or recreational values contributed to establishment of the park or open space?
- Were partners involved in the creation of the park or open space? If so, have they expressed specific needs for protection?
- What is unique or distinctive about the park or open space?

Purpose statements may vary in length. Some are brief, perhaps only one or two sentences, others may run to many paragraphs and several pages. An effective purpose statement can be a powerful tool for generating increased interest in the park or open space and encouraging increased involvement and support from influential parties such as the community, elected members, visitors, and grant-giving bodies.

3.0 PLANNING AREA



Borer's Falls Conservation Area, Courtesy of Hamilton Conservation Authority

This section of the project charter should describe the planning area that the park or open space cover. Although the planning process should address internal and adjacent uses that have an influence within the park or open space, the management direction documents will relate only to the park or open space. The management plan should also describe the influence that activities within the park or open space would have on adjacent land uses. A map clearly showing the location and boundaries of the park or open space must also be produced. It may be appropriate to consider adjustments to park or open space boundaries during planning.

The project charter should clearly provide the rationale for grouping parks or open spaces in one planning project. Considerations may include:

- Connectivity: the parks may be in proximity to each other or share a boundary;
- Environmental considerations: parks or open spaces may have a common environmental feature(s) or ecological functions;
- Risk based assessment: these parks or open spaces may have similar recreation uses and pressures; and
- Community of interest: these parks or open spaces may have common public and share common issues, cultural heritage features, recreational uses and social interests. Specifically, visitors may come to these parks or open spaces as they share a common interest.

Circumstances where grouping may not be appropriate are:

- Complexity: the park or open space may have a number of complex issues that specifically need to be addressed in a management plan;
- Large park or open space: the large size of this park or open space warrants a management plan on an individual basis;
- Isolation: the location of this park or open space is away from all other protected areas makes grouping with other protected areas for planning unfeasible; and
- Combining complex operating and non-operating parks.

The project charter should include a listing of the parks or open spaces covered by the management plan, their classification if applicable, size(s) in hectares, and a detailed map of the planning area. If applicable, a brief rationale for grouping of parks or open spaces for planning purposes should also be included.

4.0 PLANNING TOPICS

Each project charter will address what the planning team has identified as being in scope. Key topics for a planning exercise may include values, pressures and risks, priorities for management response, actions to be taken, monitoring and evaluation. These topics would be guided by a vision and objectives that will be developed during the planning exercise. Other topics to be addressed could come from the planning process and pre-consultation with individuals and stakeholders.

The following topics may be included in the project charter:

- What is in scope and out of scope
- Why the protected area was established
- Topics relating to the condition of the resource, including the following:
 - Refinement of the boundaries
 - Baseline information on and trends in significant and sensitive values
 - Integration with adjacent land management (e.g., forestry, mineral interests)
 - Access management
 - Recreational uses
- Protection and management of features, including the following:
 - Natural heritage features
 - Cultural heritage features
- Recreational uses and public education / park interpretation
- Review and potential development of visitor support infrastructure, such as the following:
 - Visitor centres, specialized recreational facilities, comfort stations and picnic shelters
 - Trailheads, signs, road systems and parking
 - Administrative and maintenance facilities
- Research projects (past and present initiatives)
- Potential controversial issues or other project risks
- Monitoring needs, if known

The planning team will identify topics for review and assessment and keep a record of them for future monitoring and evaluation.



Lion's Head Provincial Nature Reserve, Courtesy of Ontario Parks

5.0 PLANNING TEAM

A planning team should be identified for all planning projects. For large, complex projects, the team may consist of several people; one or two staff may be enough for less complicated planning exercises. The team will determine priorities for preparing a management plan.

For each management plan, particular areas of expertise may be required of planning team members, including expertise in the following:

- Facilitating the planning process
- Management planning
- Biology/ecology
- Resource management
- Monitoring
- Local knowledge of the park or natural area and its management

- Liaison with stakeholders and the public
- Issues management
- Fundraising

The expertise of specialists in information management, GIS analysis, species at risk, cultural heritage or other fields may be beneficial to the planning team. Depending on the nature and complexity of the plan, it may be appropriate for some of these specialists to serve as plan advisors. The team may also include members of or seek advice from partner organizations that share a concern for protected areas, such as the Nature Conservancy of Canada and local agencies (e.g., conservation authority, field naturalists, municipality, Parks Canada).

The project charter should identify planning team members along with their responsibilities. Advisors to the planning team should also be listed.



Cootes Paradise , Courtesy Royal Botanical Gardens

6.0 CONSIDERATION OF ADJACENT PROJECTS

The location of the planning area may be adjacent to private sector, government or agency projects. These projects, whether pre-existing or in the planning stages, could have a profound impact on the park or open space. The planning process should survey all such projects and in some way address whether and how their impact on the park or open space will be addressed. The project charter should list the adjacent projects and identify ways of involving their proponents in the planning process, such as the following:

- Distributing to proponents of external projects planning materials as they are developed
- Consulting with proponents of external projects in advance of each stage of the planning process and on an ongoing basis
- Meeting with proponents of external projects to discuss the process, issues, management proposals, and so on, as required

6.1 Ministry Programs

Many Ministry of Natural Resources (MNR) program areas have an interest in the planning process or its outcomes to support their individual mandates. It is important to document these programs to ensure they have an opportunity to engage in the project. Documentation may include:

- Who is involved – staff from appropriate districts, branches, zones, regions, and in some cases, steering committee.
- Identify program areas which are not represented on the planning team but may offer expertise (e.g., species at risk, Niagara Escarpment program).
- Define other upcoming or underway resource management initiatives and identify opportunities for integration (e.g., water management planning, forest management planning, etc.).

The project charter should list external projects and internal programs that could impact on the protected area and strategies to have consideration for their impacts.

7.0 COORDINATION OF RELATED PROCESSES

The planning process may specifically address other legislated requirements where there are opportunities for coordination of processes (e.g., permits/approvals by approval agencies e.g. provincial and municipal governments,

conservation authorities, and the NEC). Proponents should attempt to take advantage of these other processes and develop efficiencies with the relevant agencies.

8.0 PLANNING SCHEDULE AND DELIVERABLES

The stages of executing an effective management plan should be systematic and follow a logical order. The information in the management plan should identify and describe the current situation, expectations, a way of achieving the desired future situation, and methods of measuring progress.

The following are stages in the planning process:

- Drafting the project charter
- Compiling the background information document
- Developing management strategies and zoning
- Circulating the preliminary management plan
- Incorporating comments and recommendations into the preliminary management plan
- Submitting the approved management plan
- Monitoring and evaluating the implemented management plan

It is important to identify all stages for the management plan and plan along with a timeline for each stage. Also provide public consultation initiatives that will be carried out as part of this project.

9.0 PROJECT RESOURCES AND COSTS

The planning team should identify the human, administrative, logistical and financial resources needed to carry out the

8.1 Consultation

The project charter should identify the type and timing of public consultations or communications that will take place throughout the planning process. The planning team should communicate that this is an opportunity for interested parties and organizations to voice their comments and recommendations and contribute to the management plan. Individuals or organizations with a vested interest in the park or open space should be identified and their interests described.

8.2 Timelines

The project charter should indicate when major project plan activities will start and finish. In general, timelines for the preparation of management direction could be significantly shorter for Nature Reserve management plans with limited infrastructure than for more complex management plans with multiple issues.

Timelines provided need to be only estimates. Circumstances may lengthen or shorten. estimated timelines, which should not include the time required for the final approval process.

proposed project. This component is intended to provide operational direction and is only for the agency's use.

APPENDIX B – Background Information Document

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APPENDIX B – Background Information Document

1.0 INTRODUCTION



Courtesy of Niagara Parks Commission

The background information document provides agencies with guidance in gathering, interpreting, presenting and archiving resource information that is relevant to management planning for parks or open spaces. The background information provides the basis for the analysis of natural heritage features, cultural heritage features and pressures, which informs the setting of site-specific objectives, zoning and management actions later in the planning process. It is also useful in defining baseline conditions against which agencies can evaluate the effectiveness of management actions.

The key steps at this stage of the planning process are as follows:

- Collecting background information
- Identifying features and planning considerations
- Analyzing risks
- Preparing the background information document

Each of the planning steps leading to the production of the background information document has specific information requirements, which are discussed in the following sections.

2.0 COLLECTING BACKGROUND INFORMATION

This step begins with the collection and organization of the best available information. This is the foundation for a meaningful and accessible planning process.

Depending on the park or open space, this step may include collecting information about natural heritage features, cultural heritage features, recreational uses and visitor support infrastructure, social and economic benefits, research activities, public input and other relevant information.

The background information provides the basis for identifying and assessing features and constraints, which ultimately inform the setting of site-specific objectives, zoning and management actions later in the planning process. Background information is also useful in defining

baseline conditions against which agencies can evaluate the effectiveness of management actions and make adaptations as required.

To accurately assess the features of a park or open space, planning teams need to explore a variety of information sources, including existing background information, reports and maps.

The documentation standards discussed in this appendix should be viewed as a suggested minimum; the degree to which these standards can be met will be influenced by (a) the availability of information and (b) the complexity of the site and any proposed development.

3.0 IDENTIFYING FEATURES AND PLANNING CONSIDERATIONS

Having identified and documented the parks and open space features, it is important for the planning team to determine what factors are at play that may have an impact on the protected area. This may include existing uses or impacts (including long-term impacts) and those that have a high likelihood of occurrence (e.g., invasive species, urban development, road building, etc.).

A broad geographic perspective is important given that ecosystem functions often

operate at a landscape scale that may be larger than the park or open space. In this respect, adjacent features and activities may need to be considered. It should be recognized that there may also be pressures related to other types of features and/or the use of other values (e.g., cultural heritage features, recreational and land use activities and associated values).

Throughout the process of gathering and interpreting information, planning teams need to focus on three questions:

1. What are the features in the park or open space?
2. What planning considerations may affect the features?
3. What is the level of risk and the highest priority for management response/action?

In some cases, the answer to each question will be clear from the outset, but as the complexity of the management plan increases, a variety of other factors may complicate the analysis. There is a variety of provincial information sources (e.g., Natural Resource Values Information System (NRVIS) of the Ontario Ministry of Natural Resources (MNR) and the Natural Heritage Information Centre (NHIC). The NRVIS database describes values (e.g., coldwater fishery, pictograph

assemblage) and infrastructure features (e.g., roads, access points). Local sources may include earth and life science inventories, ecological and recreational mapping from MNR district offices and conservation authorities.

The NHIC compiles, maintains and distributes information on species, plant communities and spaces of conservation

concern in Ontario. This information is stored in a spatial database used for tracking this information. The NHIC also has a library containing conservation-related literature, reports, books and maps, which are accessible for use in conservation, land use planning and natural resource management. The NHIC website (<http://nhic.mnr.gov.on.ca>) provides much of this information.

4.0 ANALYZING RISKS

Analysis of the features and pressures allows the planning team to advance beyond a simple cataloguing in order to identify potential management issues.

Risk analysis leads to the identification of one or more potential management responses. In general, the values associated with the purpose of the park or open space (i.e., its role in the NEPOSS) and legislative mandates (e.g., species at risk, sustainable recreation) must be a first consideration.

In the background information stage, the initial focus of risk analysis is documenting the existing features and pressures. The most significant features within a park or open space may not necessarily be those at greatest risk. The level of risk may be affected by other factors, such as:

- the degree of fragility or susceptibility of the feature;
- the geographic extent or scope of the pressures; and
- the severity or intensity of pressures.

For example, an enduring geological feature that is not well known or that cannot be easily accessed may be at low risk of impact and therefore have a lower priority for active management and monitoring. A fossil bed or species-at-risk habitat near a road or trail may be under greater threat and require a specific management response (e.g., rerouting of trails, special protective devices) and may also require more frequent and elaborate monitoring.

Planning teams are encouraged to ask probing questions, such as those below, about components that may influence or impact features:

1. What are the uses or activities, and where do they occur in the park/open space or nearby?
2. What park/open space features(s) are potentially being affected? For each key feature,
 - what is the nature of the effects on its structure, function and composition?
 - what are the anticipated pressures that may be exerted on the value?
3. Is there efficient and effective mitigation to offset negative effects?
4. How can positive effects be optimized?
5. Are the resulting impacts on the viability of the feature acceptable?
6. What monitoring may be required to determine whether the feature is being maintained or otherwise affected?

It is critical that the results of the assessment of risk to the features are accurately captured and reflected in subsequent planning stages, and that the rationale for subsequent policy recommendations is clearly documented. Refer to Box 1 containing example objectives and actions.

Box 1: Examples of Addressing Planning Issues²

A) Mitigating invasive species

Issue: Invasive species have displaced native species

Objective: Eliminate the invasive species by reducing its percent cover by 25% per year and re-establish the native species.

Actions: Undertake mechanical removal for the first four years, then monitor and remove newly established locations immediately thereafter. Design a re-introduction program and monitoring to assess the effectiveness.

B) Establishing a new development

Issue: Potential development on snake habitat

Objective: Maintain snake habitat to help reduce snake mortality within the protected area.

Actions: Ensure that the design and construction of any infrastructure considers snake habitat needs (e.g., build in an area not used by snakes and reduce building foot print). Improve the educational opportunities and enhance appreciation of snakes and their habitat for visitors and staff.

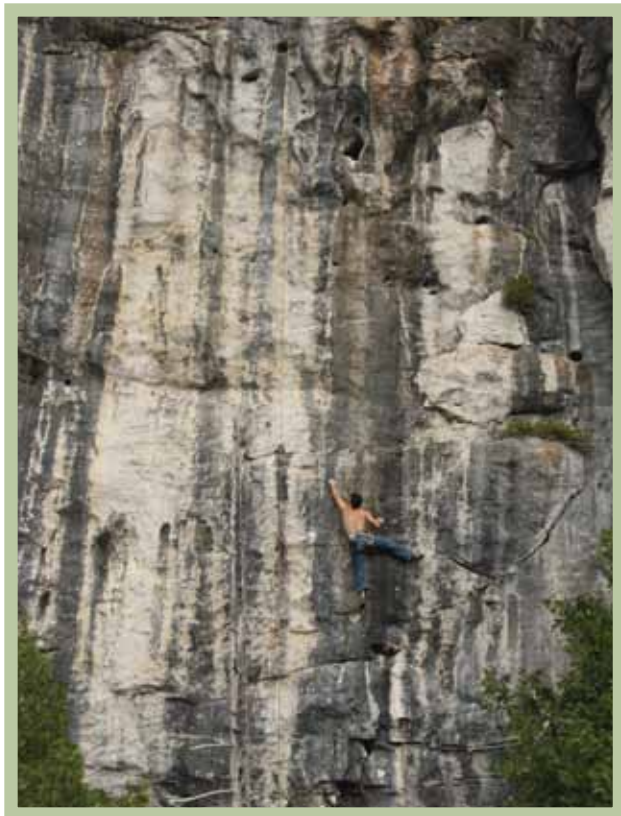
² Ministry of Natural Resources *Determining Planning and Management Priorities in the Context of Ecological Integrity: A Practical Approach for Planning Teams* (Ontario Parks: 2010)

5.0 PREPARING THE BACKGROUND INFORMATION DOCUMENT

The background information document should address all important values and benefits of the park or open space and the pressures that affect it, as well as relevant policy and past management direction.

5.1 Regional Context

To provide regional context, planning teams should provide regional and local maps of the NEPOSS area. The regional context section should also describe the surrounding population centres, access and transportation routes and surrounding land use. This section should also describe the history of planning for the area.



Climbing Lion's Head, Courtesy Ontario Access Coalition

5.2 Natural Heritage Features

The background information document should identify and describe the natural heritage features present and proximate to the area.

A structured and objective approach to the assessment of natural heritage features, supported by comprehensive background information and inventory work allows the planning team to gauge the significance of the park or open space on local, regional and provincial levels. Once natural heritage features have been identified and verified, they need to be fully documented. Documentation should be completed for all significant features, regardless of the complexity of the plan.

Table 1 describes seven natural heritage features and provides examples of documentation and management considerations. Collecting information to be included in a background information document primarily consists of (a) identifying and defining the features, (b) assessing the benefits (quantitative and/or qualitative) that may be derived from those features and (c) assessing the potential for those features to be compromised in some manner. Table 1 is not an exhaustive listing, other information may be collected.

Table 1: Natural Heritage Feature Description and Management Considerations

Natural Heritage Feature	NEP Feature Definition	Documentation and Management Considerations (not an exclusive list)	Policy Direction
Habitat of endangered species, threatened species, species of special concern and rare species	<p>Endangered Species - any indigenous species of fauna or flora that, on the basis of best available scientific evidence, is indicated to be facing imminent extinction or extirpation throughout all or a significant portion of its Ontario range.</p> <p>Threatened Species - any indigenous species of fauna or flora that on the basis of the best available scientific evidence, is indicated to be experiencing a definite non-cyclical decline throughout all or a major portion of its Ontario range, and that is likely to become an endangered species if the factors responsible for the decline continue unabated, as identified by the MNR.</p> <p>Special Concern Species - (formerly Vulnerable Species) any indigenous species of fauna or flora with characteristics that make it sensitive to human activities or natural events as identified by the MNR.</p> <p>Rare Species - any indigenous species of flora or fauna, identified by the MNR, that is represented in Ontario by small but relatively stable populations, and/or that occurs sporadically or in a very restricted area of Ontario or at the fringe of its range, and that should be monitored periodically for evidence of a possible decline.</p>	<ul style="list-style-type: none"> Identify and map features (non-public) to direct appropriate zoning Note any related research Describe past and present habitat management programs Contact local MNR District office for direction on habitat protection and species recovery Consider compatible and sustainable recreational activities (if any) Evaluate projected impact of proposed development and permitted uses Investigate required permits Review placement of the Bruce Trail and other trail systems with consideration to identified features Consider participating in community stewardship programs (e.g., species at risk) Identify and analyze permitted uses on adjacent properties 	<p>The NEP (2005) policy objective of 2.8 is to maintain habitats for endangered species and threatened species, and to promote the recovery of these species by:</p> <ul style="list-style-type: none"> New development will not be permitted in identified habitat of endangered plant or animal species Directing incompatible or unsuitable site development and site alteration away from lands that are adjacent to significant habitats <p>The <i>Endangered Species Act</i> (2007) provides for legal protection of the habitats of threatened and endangered species. MNR's official species at risk list is the Species at Risk in Ontario List which is made in regulation under Section 7 of the Endangered Species Act (2007).</p>

Natural Heritage Feature	NEP Feature Definition	Documentation and Management Considerations (not an exclusive list)	Policy Direction
Hydrological systems (e.g., streams, wetlands)	Wetlands - lands that are seasonally or permanently covered by shallow water, as well as lands where the water table is close to or at the surface. In either case the presence of abundant water has caused the formation of hydric soils and has favoured the dominance of either hydrophytic or water tolerant plants. The four major types of Wetlands are swamps, marshes, bogs, and fens.	<ul style="list-style-type: none"> Identify and map wetland boundaries Describe the communities/species Note any hydrological function and/or connections to other features Describe any monitoring/inventory programs Identify any pressures or threats Identify and describe management prescriptions for wetland – e.g., areas suitable for rehabilitation, areas to be left in natural state, areas suitable for recreation, those with sensitive species that require specific protection during part of year, etc. The wetland boundaries should be determined by a qualified wetland evaluator using the Ontario Wetland Evaluation System (OWES) 	<p>The <i>NEP</i> (2005) policies 2.6 (10-13) provide the following direction to protect wetlands:</p> <ul style="list-style-type: none"> Development shall locate outside wetlands Wetland boundaries shall be determined by the park or natural space agency in consultation with the Ministry of Natural Resources (MNR) and/or local Conservation Authority (CA) In addition to <i>NEP</i> (2005) policies 2.6 (1-7: Water Quality), development adjacent to wetlands may be permitted only if it does not result in loss of wetlands; subsequent demand for future development which will negatively affect existing wetland functions; conflict with existing site specific wetland management practices; and, loss of contiguous wetland area
Wildlife habitat	Areas of the natural environment where plants, animals, and other organisms, excluding fish, survive in self-sustaining populations, and from which they derive services such as cover, protection, or food.	<ul style="list-style-type: none"> Map wildlife features Describe past and present management programs Enhance and rehabilitate natural areas Consider projected impact of proposed development Describe existing and potential compatible and sustainable recreational activities (if any) Review placement of the Bruce Trail and other trail systems with consideration to identified features Identify and analyze permitted uses on adjacent properties 	<p>The <i>NEP</i> (2005) policy objective of 2.8 is to maintain wildlife habitats by:</p> <ul style="list-style-type: none"> Directing development and site alteration away from their habitats Directing incompatible or unsuitable site development and site alteration away from adjacent lands to their significant habitats Enhancing wildlife habitat wherever possible

Natural Heritage Feature	NEP Feature Definition	Documentation and Management Considerations (not an exclusive list)	Policy Direction
Fish Habitat	The spawning grounds and nursery, rearing, food supply, and migration areas on which fish depend, directly or indirectly, in order to carry out their life processes.	<ul style="list-style-type: none"> Map all permanent and seasonal water bodies (lakes, ponds, rivers, streams, wetlands and their drainage basins) Note water control structures and channel improvements on upstream, within, and downstream of park Describe fishery resources (species, habitat) Note any stocking programs, lake surveys, research projects, etc. Note past and current fisheries management objectives Consider the rehabilitation of fish populations and habitat Note protection of spawning beds Consider invasive species management Identify opportunities for sport fishing (if existing and appropriate) Note angling pressure 	Section 2.6 (14 and 15) of the <i>NEP</i> (2005) provides direction to ensure that water resources are maintained in a clean and healthy condition so that there is no net loss of aquatic ecosystems including fish habitat which depend upon lakes, watercourses, wetlands, and groundwater systems for their existence in accordance with the Federal Fisheries Act and any associated protocols or policies that the province and the federal government have established.
Wildlife habitat	Areas of the natural environment where plants, animals, and other organisms, excluding fish, survive in self-sustaining populations, and from which they derive services such as cover, protection, or food.	<ul style="list-style-type: none"> Map wildlife features Describe past and present management programs Enhance and rehabilitate natural areas Consider projected impact of proposed development Describe existing and potential compatible and sustainable recreational activities (if any) Review placement of the Bruce Trail and other trail systems with consideration to identified features Identify and analyze permitted uses on adjacent properties 	<p>The <i>NEP</i> (2005) policy objective of 2.8 is to maintain wildlife habitats by:</p> <ul style="list-style-type: none"> Directing development and site alteration away from their habitats Directing incompatible or unsuitable site development and site alteration away from adjacent lands to their significant habitats Enhancing wildlife habitat wherever possible

Natural Heritage Feature	NEP Feature Definition	Documentation and Management Considerations (not an exclusive list)	Policy Direction
Woodlands	Areas dominated by forest cover that is representative of the ecological site region.	<ul style="list-style-type: none"> Identify and map forest cover, tree species, understory vegetation, forest ecotype, age and successional stage. Describe the sustainable management activities for the production of wood and wood products Identify recreational opportunities and consider their sustainability Consider maintenance, restoration or enhancement of environmental conditions for wildlife and the protection of water supplies Monitor forest ecosystem function and development Ensure protection of rare or sensitive features Note habitat management and/or promotion of certain forest successional stages Identify invasive species management Describe social and economic opportunities 	Considerations for forest management planning must include relevant <i>NEP</i> (2005) policies (e.g. 2.7 (New Development in Wooded Areas), 2.8 (Wildlife Habitat), and 2.9 (Forest Management)).
Areas of Natural and Scientific Interest (ANSIs)	Areas of land and water containing natural landscapes or features which have been identified as having values related to natural heritage protection, scientific study, or education. Depending upon the features of particular areas, they may be referred to as Life Science or Earth Science sites, depending on whether they are ecological or geological features. These areas vary in their level of significance and their vulnerability to environmental impacts. They are identified by the MNR and are classified as being either of “provincial”, “regional” or “local” significance.	<ul style="list-style-type: none"> Map wildlife features Describe past and present management programs Enhance and rehabilitate natural areas Consider projected impact of proposed development Describe existing and potential compatible and sustainable recreational activities (if any) Review placement of the Bruce Trail and other trail systems with consideration to identified features Identify and analyze permitted uses on adjacent properties 	<p>The <i>NEP</i> (2005) policy objective of 2.8 is to maintain wildlife habitats by:</p> <ul style="list-style-type: none"> Directing development and site alteration away from their habitats Directing incompatible or unsuitable site development and site alteration away from adjacent lands to their significant habitats Enhancing wildlife habitat wherever possible

Natural Heritage Feature	NEP Feature Definition	Documentation and Management Considerations (not an exclusive list)	Policy Direction
Escarpment features (related landforms, brow, slope, and toe)	<p>Escarpment Related Landforms – the physical features of the land associated with the Escarpment and created by erosion, sedimentation and glaciation, often including such features as moraines, river valleys, beach ridges, drumlins and kames.</p> <p>Escarpment Brow (Edge) – the uppermost point of the Escarpment slope or face. It may be the top of a rock cliff, or where the bedrock is buried, the most obvious break in slope associated with the underlying bedrock.</p> <p>Escarpment Slope (Face) – the area between the brow and toe of the Escarpment and usually characterized by a steep gradient. Where the rise occurs in the form of a series of steps, the slope also includes the terraces between the steps.</p> <p>Escarpment Toe (Base) – the lowest point on the Escarpment slope or face determined by the most obvious break in slope associated with the bedrock or landforms overlying the bedrock.</p>	<ul style="list-style-type: none"> Identify and map forest cover, tree species, understory vegetation, forest ecotype, age and successional stage. Describe the sustainable management activities for the production of wood and wood products Identify recreational opportunities and consider their sustainability Consider maintenance, restoration or enhancement of environmental conditions for wildlife and the protection of water supplies Monitor forest ecosystem function and development Ensure protection of rare or sensitive features Note habitat management and/or promotion of certain forest successional stages Identify invasive species management Describe social and economic opportunities 	Considerations for forest management planning must include relevant <i>NEP</i> (2005) policies (e.g. 2.7 (New Development in Wooded Areas), 2.8 (Wildlife Habitat), and 2.9 (Forest Management)).

5.3 Cultural Heritage Features

Many cultural heritage features and properties are icons in the Escarpment landscape. They are important to the social, economic and cultural well-being of Ontario communities.

5.3.1 Historical and Archaeological Values

In Ontario, the task of conserving and protecting our inheritance of historically and architecturally significant features and properties is mandatory for ministries and public bodies under the Ontario Heritage Act. The Ontario Heritage Act provides the framework for provincial and municipal responsibilities and powers in the conservation of cultural heritage resources.

The Ministry of Tourism, Culture and Sport have developed the Standards and Guidelines for Conservation of Provincial Heritage Properties (2010). The purpose of these standards and guidelines is the appropriate conservation and management of provincial heritage properties.

The Ontario Heritage Tool Kit is a series of written guides developed by the Ministry of Tourism, Culture, and Sport to help land use planners understand the heritage conservation process in Ontario and to explain the Ontario Heritage Act, the Planning Act, and related programs.

The Ontario Heritage Tool Kit includes:

- Your Community, Your Heritage, Your Committee (2006), a guide to establishing and sustaining an effective Municipal Heritage Committee
- Heritage Property Evaluation (2006), a guide to listing, researching and evaluating cultural heritage property in Ontario communities
- Designating Heritage Properties (2006), a guide to municipal designation of individual properties under the Ontario Heritage Act

- Heritage Conservation Districts (2006), a guide to district designation under the Ontario Heritage Act
- Heritage Resources in the Land Use Planning Process (2006), a guide that explains cultural heritage and archaeology policies of the Ontario Provincial Policy Statement, (2005)
- Heritage Places of Worship (2011), a guide to assist in the conservation and protection of all heritage places of worship in Ontario.

The *NEP* (2005), Section 2.12, provides direction to inventory, interpret, evaluate, maintain and conserve cultural heritage features of the NEP area. Table 2 defines six NEP cultural heritage features and provides direction on how the feature information might be presented in the background information document.

Table 2: Cultural Heritage Feature Definitions and Management Considerations

Feature	NEP Definition	Management Considerations
Cultural heritage feature	Human-made features of the landscape.	<ul style="list-style-type: none"> • Conduct appropriate studies and research (including analysis of physical, documentary, and oral evidence by qualified persons), aimed at understanding the property's cultural heritage value, including its level of significance (e.g., local, provincial, etc.) • Document the feature identification process with a written account of the research and the evaluation • Develop on-going care/ maintenance schedule to prevent deterioration and sustain the heritage value of the feature for long term benefit • Consider the impact of proposed activities on the cultural heritage feature and heritage attributes, and measures to mitigate these impacts • Establish and maintain a cultural heritage conservation policy and procedure(s) for identifying and protecting the heritage properties and features, including objectives and targets and a commitment to continual improvement
Cultural Landscape	A cultural landscape is the product of human activity over time in modifying the landscape for their own purpose, and is an aggregation of human-made features such as a village, farmland, waterways, transportation corridors, and other artifacts.	
Heritage property	Features in or on the land or underwater and considered to be a consultable record of past human activities, endeavours or events (e.g. buildings, street furniture, engineering works, planting and archaeological sites).	
Local heritage value or interest	Status accorded to heritage properties by a municipality where the council of the municipality, on the advice of a Local Architectural Conservation Advisory Committee (LACAC) or the Ontario Heritage Trust, is prepared to designate or has designated, and will enter or has entered into an easement agreement under the Ontario Heritage Act.	
Provincial heritage value or interest	Status accorded properties for which provincial heritage plaques have been erected, or otherwise which have been declared to be provincially significant by the Ontario Heritage Trust, an agency of the Ministry of Tourism, Culture, and Sport.	
National Heritage Value or Interest	Status accorded to properties recognized as national historic sites on a list compiled by the Historic Sites and Monuments Board of Canada, an agency of the federal Department of the Environment – Parks Canada.	

5.3.2 Aboriginal Site Values

Aboriginal site values are generally acquired from individuals or groups within First Nation or Métis communities who are affected by a planning project. It is important to note that when information about Aboriginal site values is acquired, the community that provided it maintains ownership of it, and it is to be used only for express purposes with the community's explicit consent.

Some examples of Aboriginal site values are as follows:

- Information regarding a community's history and its association with lands and waters
 - Locations and significance of burial, hunting, gathering and fishing sites, travel routes and traditional use areas, water levels and flows
 - Aboriginal place names or values with spiritual, ceremonial or cultural significance that will require protection
- Traditional ecological knowledge
 - Observations on biophysical or geographic features
 - Landscape observations, such as the abundance of species (e.g., species at risk), habitat use, population movement, harvest levels, the collection of medicinal plants
- Information on cultural geographic features such as place names and storied places
- Information on cultural processes such as the oral history of people and places
- Information about the community's views on the potential for resource-based economic development

Site values are often unique to an individual community, and it is important to ask its members what they consider to be significant. In many cases, information on Aboriginal site values has not been previously documented, but rather has been passed along verbally. As such, it is important to fully document information received and to handle it with sensitivity.

5.4 Recreational Uses

Recreational uses are influenced by a variety of provincial policy direction for protected areas (e.g., Niagara Escarpment Plan, Ontario Provincial Parks planning and management policies, Conservation Reserves policy) and adjacent lands (e.g., Crown Land Use Policy). All parks fall into one of six classifications, each with associated policies that may influence various uses and activities.

Parks and open spaces may have recreational values that are governed by legislation and policy. These values can be physical features such as trails, boardwalks and lakes or attributes such as a scenic view or a sport fishery, see Table 3 for examples of recreational values.

Table 3: Examples of Recreational Values

Cross-country ski trail	Rock climbing and bouldering
Hiking trail	Waterfall
Boat launch	Sandy beach
Old-growth forest	Waterfowl viewing platform
Coldwater fishery	Wetland interpretive display
Scenic vista	Mountain biking trail
Skiing	Sports field

In addition, the background information document may elaborate on the qualitative and quantitative extent of use of a particular recreational value e.g. the frequency or popularity of use of a particular trail. This may provide information essential to future management direction.

5.5 Visitor Support Infrastructure

Support infrastructure may include development necessary to support park operations and activities such as visitor centers, specialized recreational facilities, administrative and maintenance facilities, roads, trailheads and parking areas, utilities, etc.

Nature Reserve parks and Natural Environment parks may include facilities, limited in scope and impact, but critical to support park operations and activities. Where feasible, the agency shall utilize design and development techniques that avoid or minimize negative impacts to features. Limited support infrastructure may include the following:

- Recreational facilities and trails supporting low impact activities and causing minimal disturbance to the environment and existing park features
- Small structures, such as shelters or restroom facilities
- Essential utilities and access routes for park maintenance and emergency vehicles provided there are no other feasible alternatives available

Special care should be taken during the planning, design and development of support infrastructure in these parks and the Nature Reserve Zone and the Natural Zone in order to protect natural heritage features and cultural heritage features.

5.6 Social and Economic Benefits

The assessment of the social and economic benefits that a park or open space generates may be influenced by when the assessment takes place. At the background information stage, the focus may be on documenting the current situation or trends of use. Later in the planning process, the focus may be on quantifying the potential benefits of different management proposals, relative to current or baseline conditions.

Social and economic benefits information in the background information document may include a quantitative and qualitative assessment of past, current and potential benefits. This may include a monetary assessment of benefits (e.g. from user fees or money generated from sustainable resource management) and an assessment of social benefits which may be more qualitative (e.g. recreational opportunities).

5.6.1 Direct Use Benefits

Direct use benefits are acquired through some form of direct physical contact with a park or open space. Examples include the benefits to visitors from on-site recreation, natural or cultural heritage appreciation or fishing.

All of the direct uses (permitted, potential, nonconforming, etc.) currently occurring in the park or open space should be documented, as well as information about who the users are, the extent of use, alternative sites for the use, environmental costs of the use and what value users place on the use.

5.6.2 Community Benefits

Community benefits are the benefits that local and regional communities acquire as a result of establishing the park or open space. This benefit category includes items such as tourism and related job creation, enhanced quality of life, and increased economic diversity and sustainability. Descriptions of the local communities (including demographic and industry profiles) should be included in this section.

Additionally, if data is available, the economic impact of government and visitor spending should be assessed.

5.6.3 Scientific and Educational Benefits

Scientific and educational benefits are those benefits received through an increase in personal appreciation, knowledge and scientific discovery. Research activities that have occurred in the park or open space should be documented, and the educational opportunities that the park or open space provides should be described.

5.7 Planning Considerations

After identifying the features of the park or open space, the planning team must then consider negative or positive impacts on values or ecosystem functions. In some cases, activities on adjacent lands or waters can have impacts on the park or open space as great as those resulting from activities within it.

A planning consideration may be a value or pressure, or potentially both. Differentiating between a value and a pressure may be difficult. For instance, a viewing platform at a scenic vista may be categorized as a structural value that yields a direct benefit (nature appreciation) to its users. At low to moderate use levels, the platform would probably continue to be characterized as a “value.” If the use of the platform increases to the point that it results in environmental degradation to the surrounding ecosystem, however, the value may become a pressure. Table 4, while not intended to be exhaustive, identifies a number of planning considerations that can occur within a park or open space that may need to be identified during planning:

Table 4: Examples of Planning Considerations

Campsites (maintained)	Boat caches
Drainage areas, ditches	Authorized or unauthorized dump sites
Firewood cutting	Land cultivation
Livestock grazing	Rock climbing or bouldering
Shoreline hardening	Forest harvesting
Geocaches	Human waste
Mountain bike trail	Non-native species
Any other activity that changes the natural vegetation structure or natural succession of a vegetation community or earth science feature	Other private or public structures, including hydro facilities, power plants and buildings, and any other past capital projects observed or known to occur on the site, including parks infrastructure
Primary, secondary and tertiary roads	Railways or old railway corridors
Trails (equestrian, hiking)	Tree plantations
Utility corridors (subsurface or overhead)	Waterway crossings, such as dams, culverts, bridges

5.8 Existing Park and Open Space Policy

The majority of parks and open spaces have some form of management direction. For parks or open spaces for which approved management direction documents have not been prepared, general management direction must be drawn from higher level policies.

5.8.1 Past Management Direction Documents

If the park or open space already has some form of management direction, the initial focus of the background information stage will be on assessing the quality of existing resource information, confirming its accuracy and continuing relevance, and identifying any significant gaps.

Past management direction documents will help the planning team:

- gain a historical perspective regarding the park or open space, its significance and its evolution;
- understand what the current management direction is intended to accomplish;
- document what the values were when planning was originally undertaken;
- determine what uses were permitted;
- indicate any enhancements (e.g., campgrounds, restoration activities, wildlife management activities);
- understand linkages with other sites if the park or open space was part of a grouping exercise; and
- identify and assess the effectiveness of monitoring activities.

When past management direction documents exist (e.g., terms of reference, background information, management proposals, approved management direction, implementation plans), they may be revised as appropriate.

REFERENCE – MAPS

Recommended maps that should be presented for public review include an overview map of the park or open space, and maps showing particular aspects of it, such as natural heritage features and cultural heritage features, recreational values, zones, ecological function, and so on. A complex planning project may warrant including these and other types of customized maps

Aboriginal Values Map

The aboriginal values map is intended to highlight significant aboriginal sites within and adjacent to a suite of parks or open spaces. Aboriginal values can include community meeting areas, spiritual sites, places of worship, cemeteries and burial sites, etc. The information portrayed on the aboriginal values map is highly sensitive in nature, it is critical that this information is not disseminated to inappropriate audiences.

Condition Map

Condition mapping is designed to display the state of the protected area. Condition highlights areas that are free from human-related pressures and are presumably in better condition than areas impacted by human pressure.

Cultural Heritage Map

Cultural heritage mapping is designed to portray information related to cultural heritage in Ontario, such information as archaeological sites defining past cultural activities within a protected area. Information indicated on a cultural heritage map may include locations of homesteads, village communities, logging chutes, cemeteries, depot farms, logging camps, etc.

Landscape Diversity Map

The landscape diversity map portrays the landform variations within a protected area. This map highlights both forest-vegetative communities and localized geological representation.

Natural Heritage Feature Map

The map of special natural heritage features highlights populations of species and vegetation communities known to be rare in Ontario, and may include localized habitat features that are critical to their persistence. Other features that may be mapped include distinct locations for bird migration, such as Important Bird Areas. In the context of earth science, special features may include bedrock type sections, fossil localities and distinct landforms.

Overview Map

The overview map of the park or open space provides a regional perspective for the park or natural space in the context of its surroundings.

Permanent Ecological Function Map

The map of permanent ecological functions highlights those of significant importance on the landscape, such as hydrological functions. This map may include water bodies, drainage, wetlands, groundwater recharge and discharge areas, and headwater and catchment areas.

Transient Ecological Function Map

Transient (short-term) ecological function mapping highlights ecological functions such as fire disturbances that are more dynamic in nature. Other transient functions may include wind-throw, naturally flooded areas, native insect damage, ice storm damage, etc. Transient earth science processes are also highlighted on this map, some examples include landslides talus (mass wasting) forming processes, frost heaving and riverbank erosion.

Recreational Values and Supporting Infrastructure Map

The map of recreational values and facilities shows, for example, where trails, buildings, comfort stations, educational centres, access points and roads are on the landscape

Social and Economic Context Map

The map of the social and economic context highlights the demographic attributes of the region in which the park or open space is situated. Such attributes include, but are not

limited to, population size, density and distribution; ethnicity; household income; age; user origin; and postal codes. This map is intended to increase awareness about the region and the visitors who are, or could be, using the site.

Zoning Map

The zoning map is designed to provide a clear depiction of the NEPOSS zones relative to the park or open space. This map is based on the completed resource inventory and information analysis which guided the assignment of zones in the park or open space.

APPENDIX C – Approval Statement Template

1.0 INTRODUCTION

The agency must submit the management plan and approval statement to the Niagara Escarpment Commission (NEC) and the Ministry of Natural Resources (MNR) for formal approval. The final draft of the management plan must conform to the Niagara Escarpment Plan (NEP), in accordance with the Niagara Escarpment Planning and Development Act (NEPDA). An approved management plan may facilitate the process for subsequent development permits.

1.1 What to Submit for Management Plan Approval

Completed management plans are submitted to the NEC along with three (3) signed approval statements. An approval statement should appear in all approved management plans for public lands in the NEPOSS.



Mountainview Conservation Area, Courtesy of Niagara Peninsula Conservation Authority

Niagara Escarpment Parks and Open Space System Planning Manual

Approval statements should be brief and contain the following elements:

Paragraph 1 – The first paragraph should contain a brief description of the park or open space.

Paragraph 2 – The second and third paragraphs should illustrate that the individual with signing authority commits to the management plan, as shown in the following example:

I am pleased to approve the [name of park or open space area] Management Plan as the policy for the management and development of this park. The plan reflects the [managing agency's] intent to protect the natural environment of the Niagara Escarpment and the natural [and cultural, if applicable] features of the [park name] and to [maintain and/or develop] high-quality opportunities for natural [and cultural, if applicable] interpretation, recreation and enjoyment of the Niagara Escarpment by Ontario residents and visitors.

Note: For provincial parks, the approval statement appearing in the *Protected Areas Planning Manual* will be substituted for the above.



Hilton Falls Conservation Area, Courtesy of Halton Conservation

Sample signature block

Date: _____

Director [or Manager]

[Name of Agency]

Note: This statement should be signed by the person or people in the agency who have authority for approving management plans, as shown in the following example:

Date: _____

(For Ontario Parks Management Statements or Management Plans)

Minister, Ministry of Natural Resources

Date: _____

Manager, Conservation Authority

Date: _____

Executive Director, Bruce Trail Conservancy

If the park is a co-management project (e.g., NEPOSS lands jointly managed by a conservation authority, the MNR and/or a county), the signatures of representatives from all implementing agencies should appear in the approval statement.

Paragraph 3 – This paragraph states that the management plan conforms to the NEP and other relevant legislative requirements.

I am pleased to confirm that this park management plan is in conformity with the general intent and purpose of the Niagara Escarpment Plan.

Date: _____

Assistant Deputy Minister, Niagara Escarpment Commission

Date: _____

Director, Natural Heritage, Lands and Protected Spaces Branch

Ministry of Natural Resources

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Ministry of Natural Resources

Natural Heritage and Land Use Planning Section

300 Water Street, 5th Floor, North

Peterborough, ON K9J 8M5